Managing the CaseMap Admin Console

User Guide

CaseMap® Server, Version 1.6

- Accessing the CaseMap Admin Console
- Registering CaseMap Servers
- Accessing CaseMap Server Properties
- Registering SQL Servers
- Setting Up Roles and Users
- Managing SQL Cases
- Replicating/Synchronizing Cases

LexisNexis®

Managing the CaseMap Admin Console Administration Guide

CaseMap®
DocPreviewer™
DocManager™
CaseMap® Server
TextMap®

Version: CaseMap® Server 1.6, CaseMap® Admin Console 1.6, CaseMap® SQL Import Utility 1.0, TextMap® SQL Import Utility 1.0
Release: March 14, 2011

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About CaseMap Server

Chapter

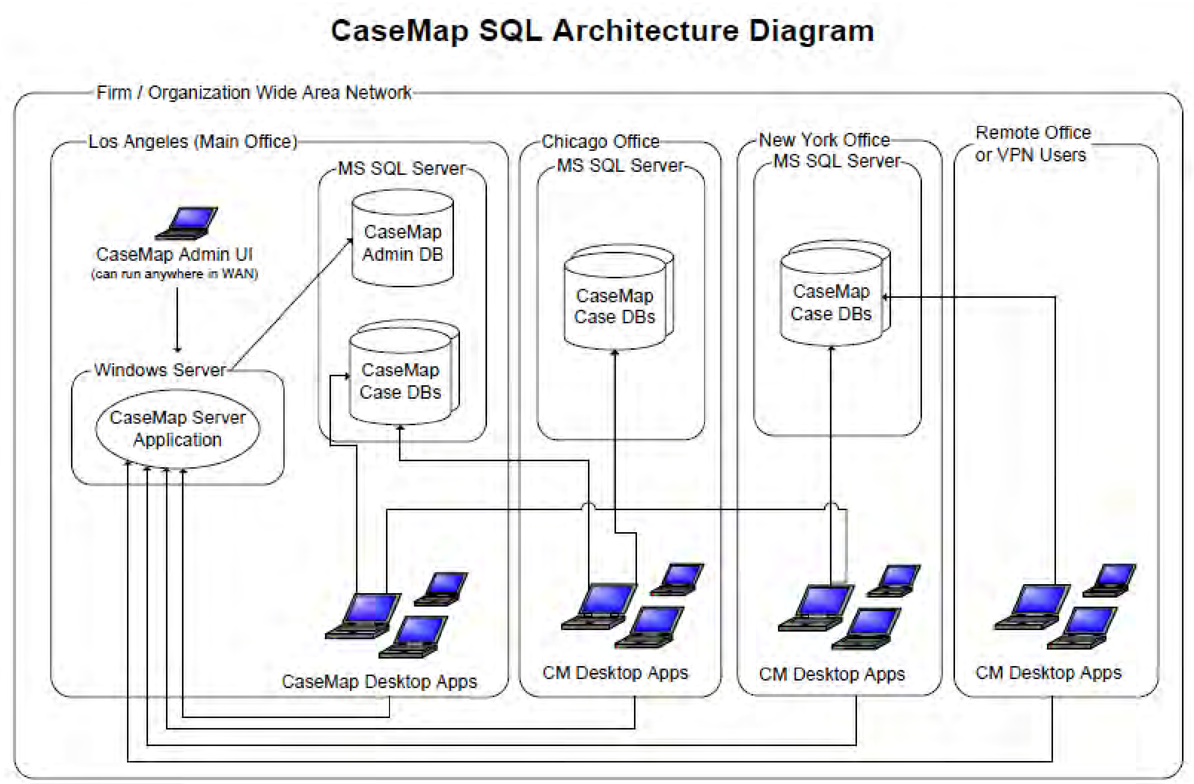
1

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.



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

Managing the CaseMap Admin Console

Chapter

2

Managing the CaseMap Admin Console

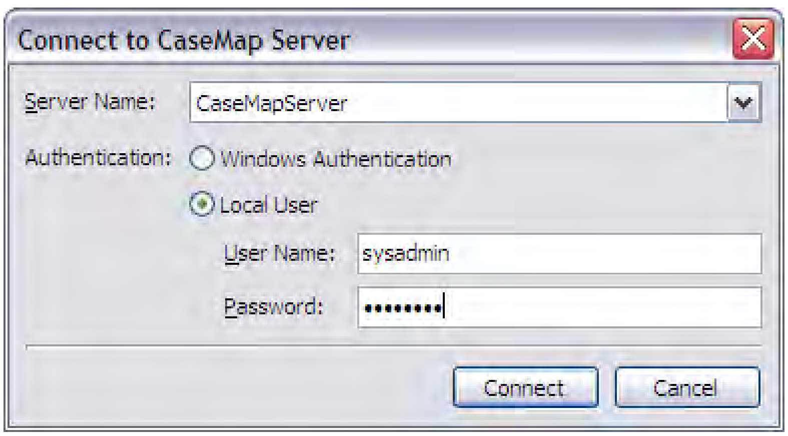
Accessing the CaseMap Admin Console

You can install the CaseMap Admin Console on any PC with an Internet connection to manage the CaseMap Server. When you try to connect to the CaseMap Server, you are prompted to select a CaseMap Server and enter logon credentials.

To log on to the CaseMap Admin Console

1. Double-click on the **LexisNexis CaseMap Admin Console** icon.

2. In the **Connect to CaseMap Server** dialog box, select the server you want to use in the **Server Name** field listing.



3. Select the authentication type you want to use: **Windows Authentication** or **Local User**.

   If you select Local User, then you need to type in a user name and password.

4. Click **Connect** to connect to the CaseMap Admin Console.

   The CaseMap Admin Console now opens to display registered SQL Servers and SQL cases, in addition to the users and roles that can create or are assigned to SQL case files.

Related Topics

About CaseMap Server

Installing CaseMap Admin Console

Registering CaseMap Servers

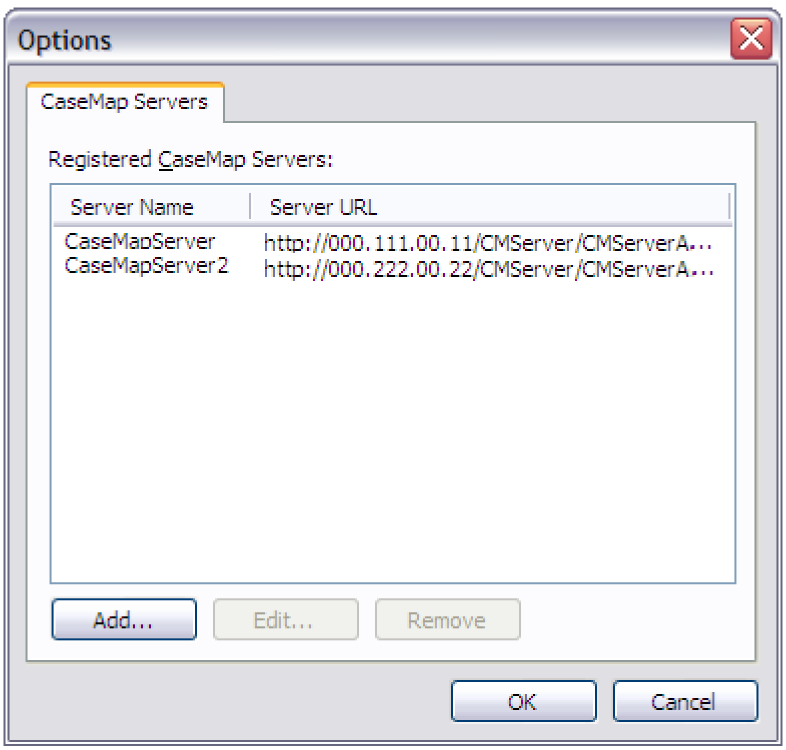
Registering CaseMap Servers

The Tools > Options tab allows you to register CaseMap Servers in the CaseMap Admin Console so that you can connect to it. The CaseMap Servers tab lists all servers registered in the CaseMap Admin Console and displays the server name and URL address for each. Each CaseMap Server name should be unique and non-case sensitive.

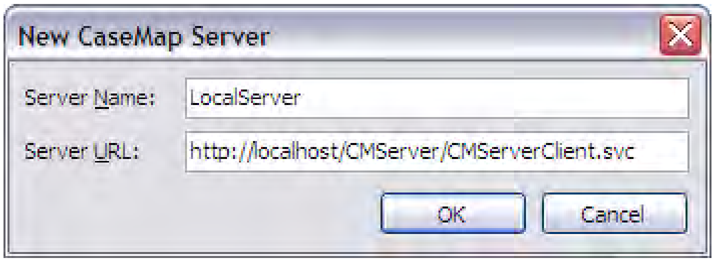
You can also register CaseMap Servers in the CaseMap and TextMap client applications by clicking Tools > Options > CaseMap Servers.

To register a CaseMap Server

1. On the **Tools** menu, click **Options**.
2. In the **Options** dialog box, click the **Add** button to open the **New CaseMap Server** dialog box.



3. In the **Server Name** field, type in the server name.



4. In the **Server URL** field, type in the CaseMap Server address for the client application.

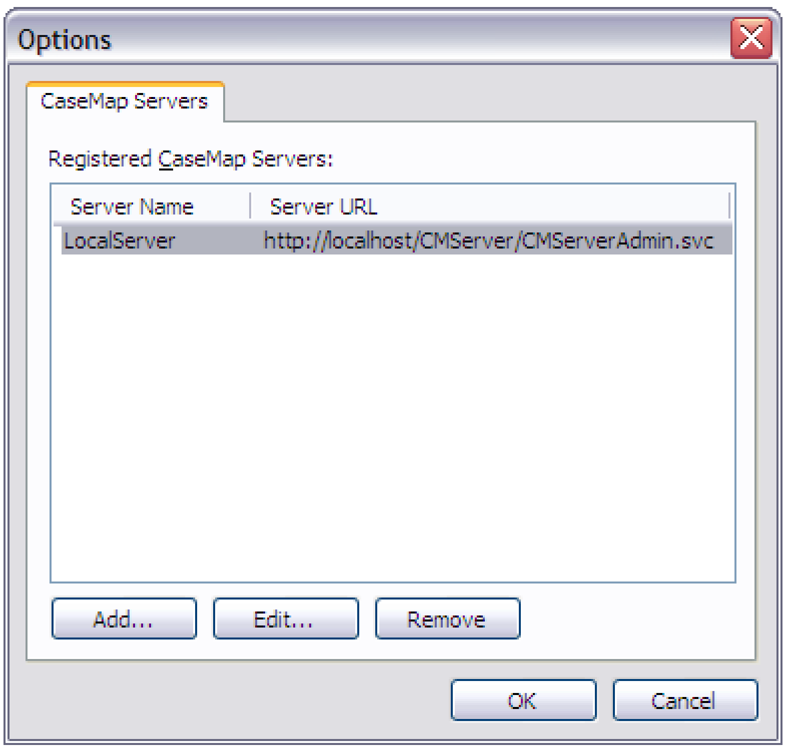
   For example: http://[Your Server Name Here]/CMServer/CMServerAdmin.svc.

   If you installed CaseMap Server with the default options, simply replace [Your Server Name Here] with the name or address of the machine hosting the CaseMap Server.

5. Click **OK**.

To edit a CaseMap Server

1. On the **Tools** menu, click **Options** to open the CaseMap Servers tab.



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

3. Click the **Edit** button.

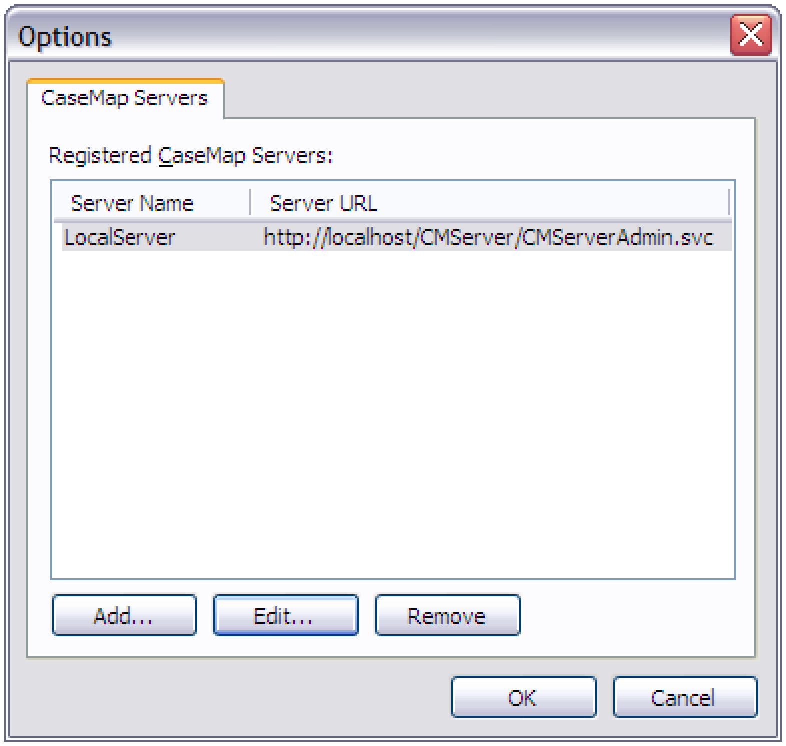
4. In the **Edit CaseMap Server** dialog box, modify the server name or server URL, then click **OK**.

   The changes now display in the Registered CaseMap Servers box.

5. Click **OK** to save your changes.

To remove a CaseMap Server

1. On the **Tools** menu, click **Options** to open the CaseMap Servers tab.



2. In the **Registered CaseMap Servers** box, select the server you want to remove.
3. Click the **Remove** button.

   The selected server no longer displays in the Registered CaseMap Servers box.
4. Click **OK** to save your changes.

Related Topics

Registering SQL Servers
Accessing CaseMap Server properties
Registering SQL case files

Accessing CaseMap Server Properties

Accessing CaseMap Server properties

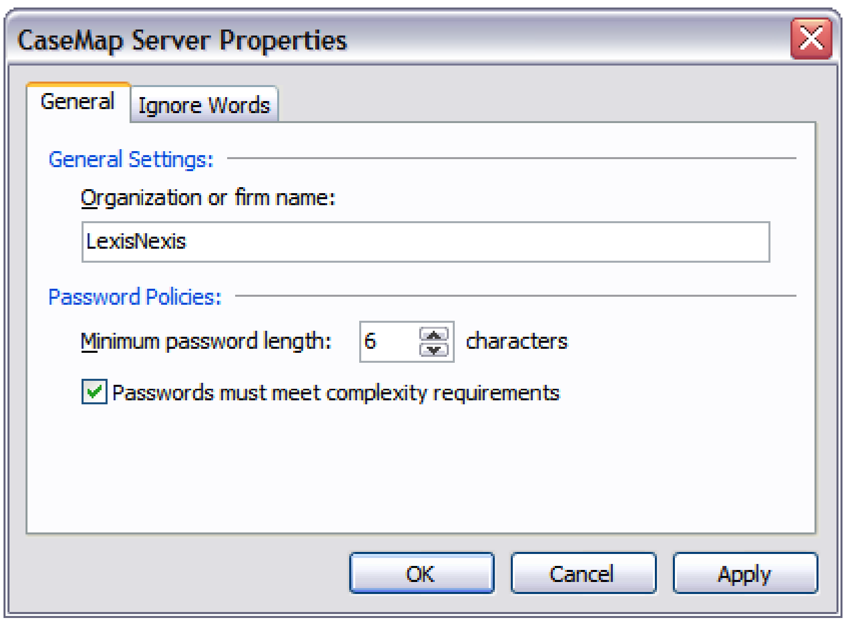
Use the CaseMap Server Properties dialog box to set password policies and enter your organization or firm name. TextMap users can also edit the global Ignore Words list for new SQL cases created or registered in the CaseMap Admin Console.

To access CaseMap Server properties

1. In the **CaseMap Server** pane, click on the **CaseMap Server** (the root node in the navigation pane).

   You can also right-click on the CaseMap Server and click CaseMap Server Properties.

2. Click on the **CaseMap Server Properties** button to open the CaseMap Server Properties dialog box.



3. In the **Organization or firm name** field, type in the name of your organization.

   The maximum character limit for an organization or firm name is 255 characters.

4. In the **Password Policies** area, type in the minimum number of characters for the password length.

5. Select the **Passwords must meet complexity requirements** check box to enforce this policy.

   The password requirements enforced by selecting this option include:

   - Passwords must be six characters or longer
   - Passwords cannot contain three or more characters of the UserName or FullName
   - Passwords need to have at least three of the four following classes of characters:

Numeric, UpperCase, Special Characters (e.g. @, #, $, etc)

6. Click **OK** to save your settings.

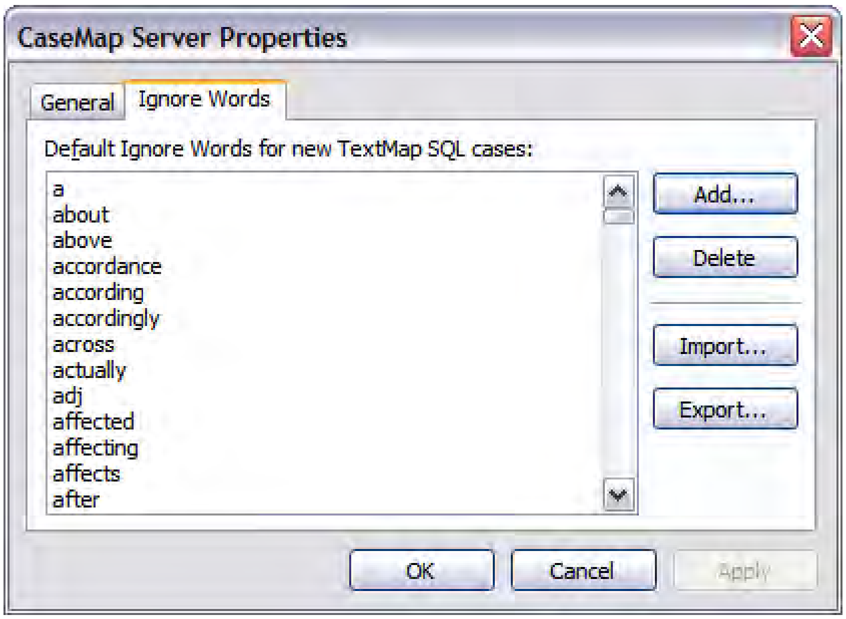
To modify the Ignore Words list for TextMap SQL cases

1. In the **CaseMap Server** pane, click on the **CaseMap Server** (the root node in the navigation pane).

   You can also right-click on the CaseMap Server and click CaseMap Server Properties.

2. Click on the **CaseMap Server Properties** button.

3. In the **CaseMap Server Properties** dialog box, click the **Ignore Words** tab.



4. Choose whether to add or delete a word from the list.
   - Click the Add button to add a new term to the list.

     In the Ignore Words dialog box, type in the new term, then click OK.
   - Click the Delete button to remove a selected word from the list.

5. Click **OK** to save your changes.

To export the Ignore Words list

1. In the **CaseMap Server** pane, click on the **CaseMap Server** (the root node in the navigation pane).

2. Click on the **CaseMap Server Properties** button.

3. In the **CaseMap Server Properties** dialog box, click the **Ignore Words** tab.

4. Click the **Export** button.

5. In the **Export Ignore Words** dialog box, locate the directory folder where you want to

save the file.

6. In the **File Name** box, type in the name you want for the list, then click **Save**.

To import the Ignore Words list

1. In the **CaseMap Server** pane, click on the **CaseMap Server** (the root node in the navigation pane).
2. Click on the **CaseMap Server Properties** button.
3. In the **CaseMap Server Properties** dialog box, click the **Ignore Words** tab.
4. Click the **Import** button.
5. In the **Import Ignore Words** dialog box, select the file you want to import, then click **Open**.

   The new Ignore List is now added to the case file.

Related Topics

Accessing the CaseMap Admin Console
Registering SQL Servers

Registering SQL Servers

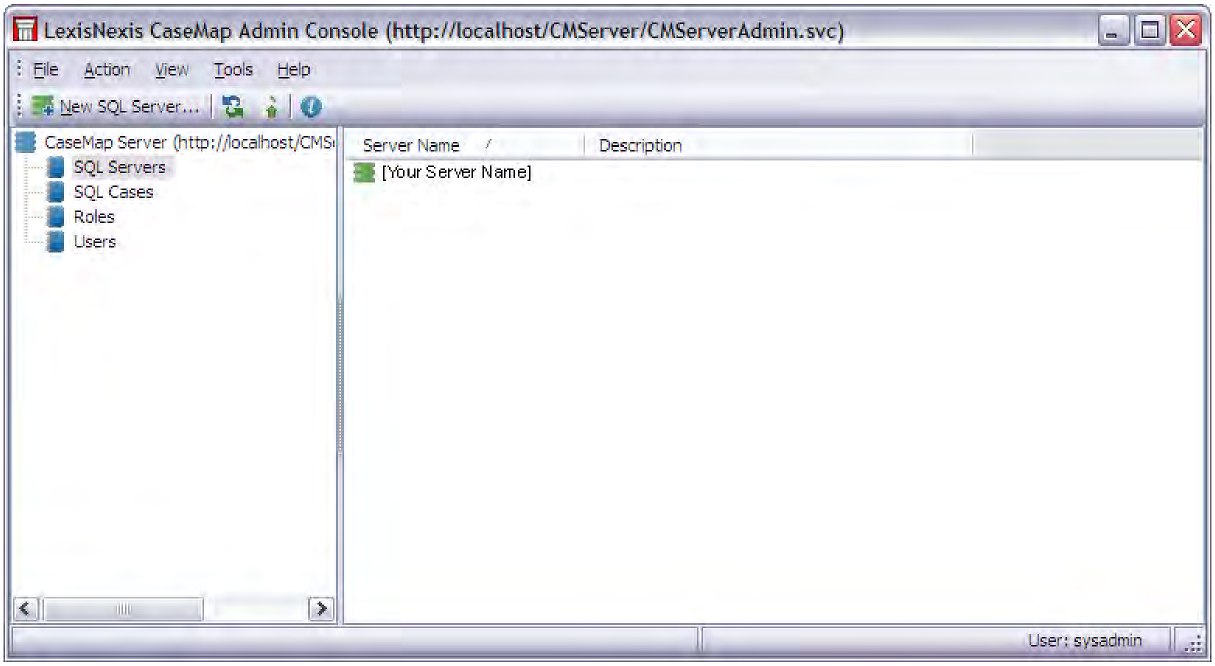
Registering SQL Servers

The SQL Servers pane allows you to register SQL Servers in the CaseMap Admin Console so that you can store CaseMap or TextMap case databases on them. The SQL Servers pane also lists all registered servers and displays the server name and description for each.

During the server registration process, the Administrative Credentials and Desktop Application Credentials areas require a SQL Server Authentication login account. The SQL Server login account configured for Administrative Credentials should be granted the database owner (dbowner) and database creator (dbcreator) roles. The database owner role is required to successfully perform internal application operations like changing isolation levels and enabling single user mode. The database creator role is required to create new case databases directly in the CaseMap Admin Console.

If the administrator only wants to register servers (and not create SQL cases) in the CaseMap Admin Console, the database creator role is not needed for that user.

Once a SQL Server is registered in the CaseMap Admin Console, it is ready to have cases associated with it. Each SQL Server name should be unique and non-case sensitive.



Use the SQL Servers pane to:

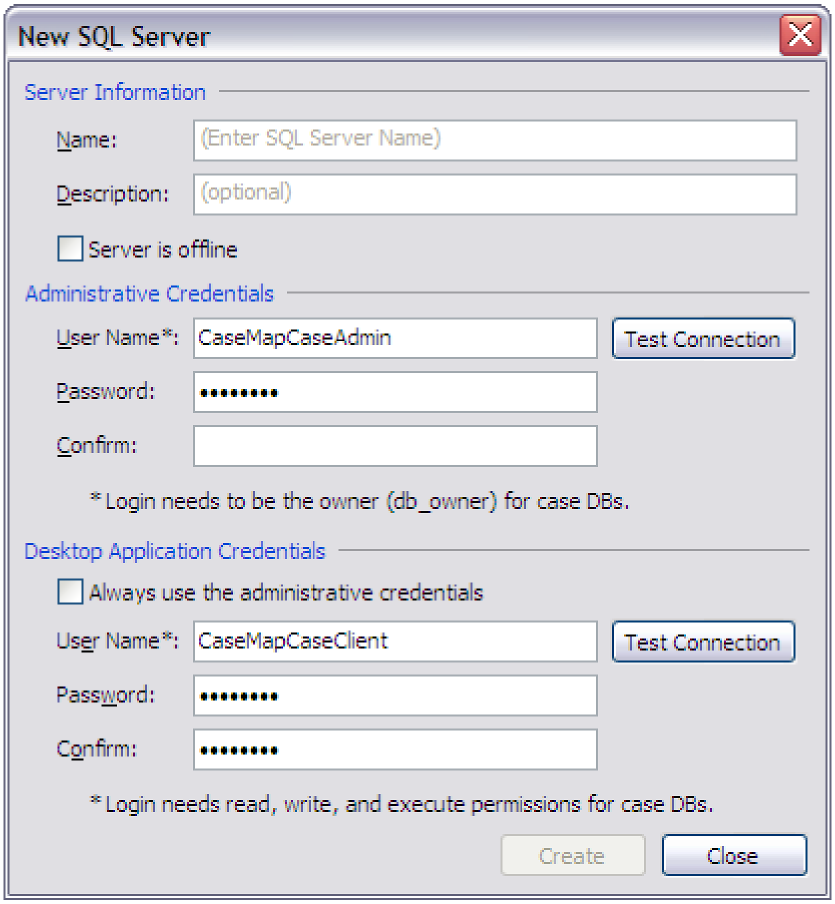
- View a complete listing of registered SQL Servers
- Register new servers
- Take a server offline
- Rename servers
- Refresh the server list
- View/edit server properties
- Delete servers
- Export a list of servers

To register a new SQL Server

1. In the **CaseMap Server** pane, click on **SQL Servers**.
2. Click the **New SQL Server** button on the toolbar.
3. In the **New SQL Server** dialog box, type the name of an existing SQL Server in the **Name** field.

   This should be the SQL Server where you want to host cases.

   The SQL Server name has a maximum character limit of 128.



4. In the **Description** field, type in a server description (optional).

   The Description field has a maximum character limit of 200.

5. In the **Administrative Credentials** area, type in a CaseMap case administrator user name.

   This login account needs to be the database owner in SQL Server for all cases registered on the server (existing or new).

   This login should also be the database creator in SQL Server, if this user wants to create cases in the CaseMap Admin Console.

   The user name has a maximum character limit of 272.

6. In the **Password** and **Confirm** fields, type in the password for this user and re-enter it.

   The password has a maximum character limit of 100.

7. In the **Desktop Application Credentials** area, type in the desktop application credentials for the SQL Server client User Name, Password, and Confirm password fields.

   This login needs read, write, and execute permissions for case databases.

8. Click the **Test Connection** button to verify that you can connect to the server.

You should test the connection for both sets of credentials.

9. In the message box to verify the connection, click **OK**.
10. Click the **Create** button to register the SQL Server database.
11. Click the **Refresh** button any time you need to update the server list.
12. Click **Close** when you are finished.

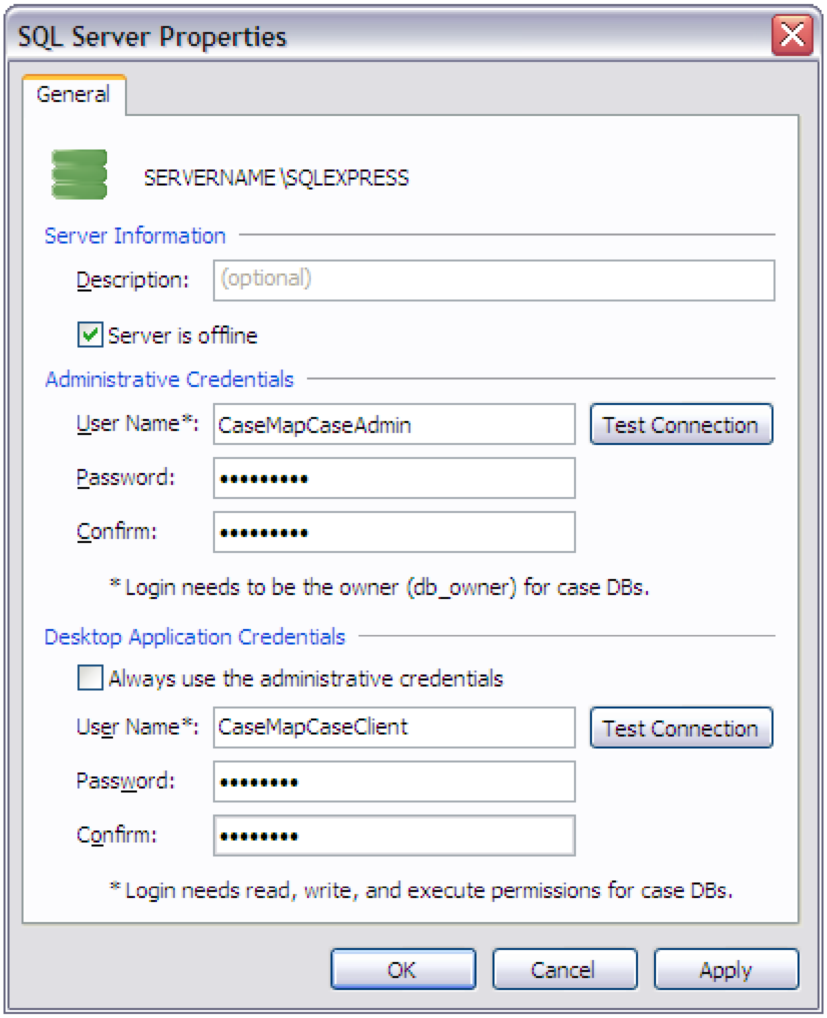
    The new SQL Server now displays in the SQL Servers pane.

You can also add or modify registered CaseMap Servers from both the CaseMap and TextMap client applications. On the Tools menu, click Options and then click the CaseMap Servers tab.

To take a SQL Server offline

1. In the **CaseMap Server** pane, click on **SQL Servers**.
2. Select the SQL Server you want, then click the **SQL Server Properties** button.

   You can also double-click on the SQL Server to open the SQL Server Properties dialog box, or right-click on it and select SQL Server Properties.
3. In the **SQL Server Properties** dialog box, select the **Server is offline** check box, then click **OK**.



A red dot now displays on the server icon  to indicate that the server is offline.

Users are unable to access case files registered to this server until you deselect the Server is offline check box.

To rename a SQL Server

Rename the SQL Server if the cases have been moved to a different SQL Server.

1. In the **CaseMap Server** pane, click on **SQL Servers**.
2. Select the SQL Server you want to rename.
3. Right-click on the SQL Server and click **Rename**.

   You can also click the Action menu and then click Rename, or select the Rename the selected item button.

4. In the message box, click **OK**.
5. In the **Rename** dialog box, type in the new **SQL Server** name, then click **OK**.

The new SQL Server name now displays in the SQL Servers pane. The server list does not resort after a name change.

Renaming the server here will not rename the SQL Server instance. Only rename the server if the name is incorrect or you have moved all of the cases on this server to a different SQL Server.

To edit SQL Server Properties

1. In the **CaseMap Server** pane, click on **SQL Servers**.
2. Select the SQL Server for which you want to edit properties.
3. Click the **SQL Server Properties** button.

   You can also right-click on the server and click SQL Server Properties, or click on the Action menu and click SQL Server Properties.
4. In the **SQL Server Properties** dialog box, enter your edits.
5. Click **OK** to save your changes.

At least one server must be listed in the SQL Servers pane in order to edit server properties.

To delete a SQL Server

1. In the **CaseMap Server** pane, click on **SQL Servers**.
2. Select the SQL Server you want, then click the **Delete** button.

   You can also right-click on the server and click Delete, or click on the Action menu and then click Delete.
3. In the message box, click **Yes** to confirm removing the server.

   The SQL Server no longer displays in the SQL Servers pane.

You cannot delete a server that has one or more active or inactive cases associated with it. You can delete a server that has deleted cases associated with it.

⚠ Once a SQL Server is deleted in the CaseMap Admin Console, it is permanently removed from the CaseMap Admin Console and the CaseMap Server.

To export a server list

1. In the **CaseMap Server** pane, click on **SQL Servers**.
2. Click the **Export list** button .

3. In the **Save As** dialog box, locate the folder where you want to save the exported server list, then click **Save**.

4. In the message box to confirm the export and view the saved file, click **OK**.

   The exported server list is now saved in a directory folder so you can reference it later using Microsoft® Excel.

Related Topics

Accessing CaseMap Server properties
Configuring SQL Server for CaseMap Server
Creating SQL case files

Setting Up Roles and Users

About roles and users

In order for users to access SQL cases in CaseMap or TextMap, you must first set them up as users in the CaseMap Admin Console, and assign them to a role and a SQL case.

If you are migrating existing cases to the CaseMap Server, you will need to map users from the local CaseMap or TextMap Case Staff Member list to the CaseMap Server user accounts set up in the CaseMap Admin Console before users can access the SQL case version in CaseMap or TextMap. For more information, see Mapping users.

Reference the Setting Up Users Checklist

Reference the following checklist when setting up users in the CaseMap Admin Console.

Checklist: Setting Up Users	
	Task
☐	If you are using Windows Authentication, you must first set up users in Active Directory before adding them as users in the CaseMap Admin Console.
☐	The spelling of the user name must be the same as the user name in Active Directory.
☐	Distinct user IDs and passwords need to be the same for each case database.
☐	If you are migrating existing cases to the CaseMap Server, you will need to map

Checklist: Setting Up Users	
	Task
	users from the local CaseMap or TextMap Case Staff Member list to the CaseMap Server user accounts set up in the CaseMap Admin Console before users can access the SQL case version in CaseMap or TextMap.

Create roles to apply user permissions

The CaseMap Admin Console provides the ability to create roles with varying permissions to help you quickly apply permissions to user accounts. We suggest you create roles based on the types of administrators needing access to the CaseMap Admin Console and the types of users accessing cases in CaseMap or TextMap.

For more information, see Creating roles.

Restrict user account access to case files

Based on the roles assigned in the CaseMap Admin Console, you can prevent most users from accessing any administrator level menu options or features. These items do not display at all or are inaccessible.

Disabled features can also be verified in the client application (CaseMap or TextMap) from the Help menu by clicking About LexisNexis CaseMap/TextMap. Next, click on the Disabled Features button to view a list of disabled features for the user currently logged into the client application.

Restrict admin accounts to SQL cases

Based on the role assignment set up in the CaseMap Admin Console, you can prevent most users from accessing any administrator level menu options or features. These items do not display at all or are inaccessible.

Administrator roles can be created to only allow case administrators the ability to add and modify user accounts for a set of assigned SQL cases in CaseMap or TextMap. Other Administrator roles may be set up to create the SQL databases and SQL case files in the CaseMap Server for CaseMap or TextMap.

For more information, see Creating roles.

Map users for local cases migrated to CaseMap Server

If you are migrating existing cases to the CaseMap Server, you will need to map users from the local CaseMap or TextMap Case Staff Member list to the CaseMap Server user accounts set up in the CaseMap Admin Console before users can access the SQL case version in CaseMap or TextMap.

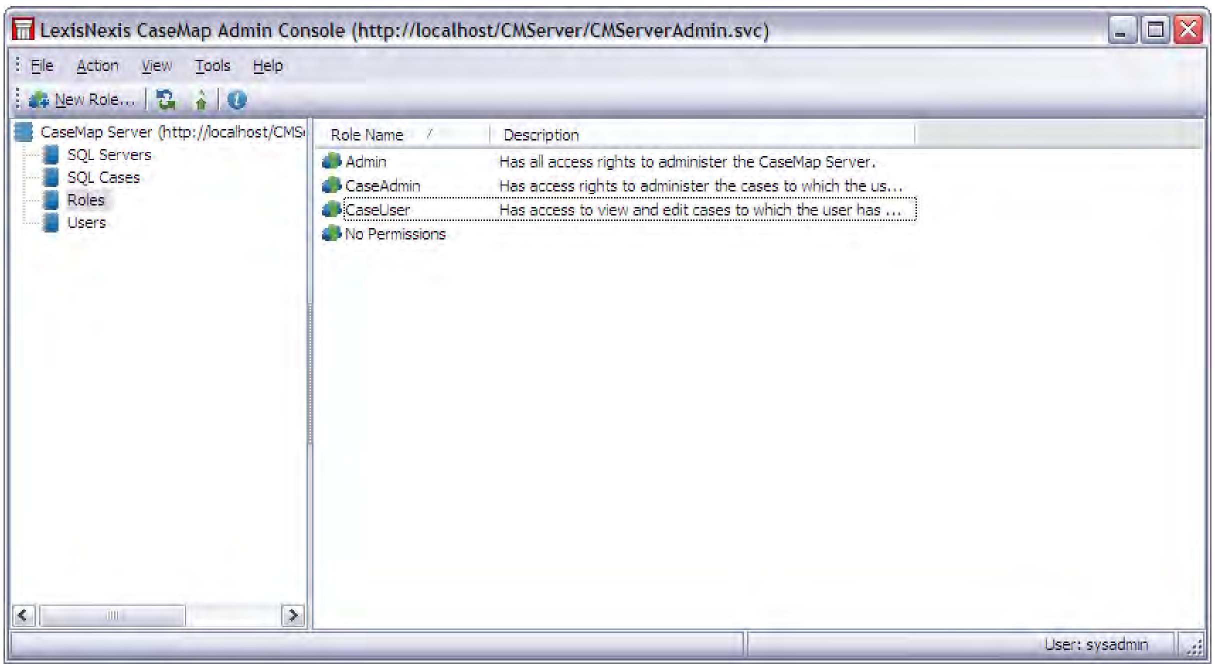
For more information, see Mapping case users.

Related Topics

[Creating roles]
[Creating users in the Admin Console]
[Mapping users]

Creating roles

The Roles pane allows you to view a complete listing of roles based on case users or case administrators. Setting up roles allows you to quickly apply permissions for new CaseMap and TextMap case users because each role already contains pre-defined permissions.



Use the Role pane to:

- View a complete listing of roles for a case database
- Create new roles
- Rename roles
- Delete roles
- Refresh the role list
- Export a list of roles
- View role properties

⊟ **To view a complete listing of CaseMap role permissions**

Reference the following table for a complete listing of role permissions you can apply for CaseMap administrator and case user rights. Permissions will vary for the types of administrator roles and case user roles you set up.

Role Permissions	
Admin Options	**CaseMap User Options**
Administer any CaseMap case	Create local cases
Administer assigned CaseMap cases	Create local case templates
Administer server configuration	Open local cases
Alter any case	Open SQL case templates
Alter assigned cases	Administer local case staff
Alter any role	Create replicas of SQL cases
Alter any SQL server	Create replicas of local cases
Alter any user	Open replica cases
Connect Admin Console	Synchronize replicas
Create CaseMap case	Resolve synchronization conflicts
Create role	Convert replica into master
Create SQL server	Create case fields
Create user	Delete case fields
Delete any CaseMap case	Administer field security
Delete any role	Rename case fields
Delete any SQL server	Increase description field size
Delete any user	Alter case field fixed list values
Export any CaseMap case replica	Convert list fields between fixed and open ended
Export any CaseMap case snapshot	Administer ReportBooks
Export assigned CaseMap case replicas	Import PDF documents
Export assigned CaseMap case	Import data from text files

Role Permissions	
Admin Options	**CaseMap User Options**
snapshots	
	Import e-mails from Outlook
	Import Issues from NoteMap
	Convert emails to PDF documents
	Bates stamp PDF documents
	Batch copy linked files or PDF documents
	Batch print linked PDF documents
	Administer case file viewers
	Bulk change case linked file viewer
	Bulk change case linked file paths
	Bulk auto number records
	Bulk field copy
	Bulk field update
	Bulk link case issues
	Bulk delete all records in view
	Run case scripts
	Import my scripts
	Alter my scripts * Consider restricting access to advanced users who know how to write/edit scripts
	Import all users scripts
	Alter all users scripts * Consider restricting access to advanced users who know how to write/edit scripts

To view a complete listing of TextMap role permissions

Reference the following table for a complete listing of role permissions you can apply for TextMap administrator and case user rights. Permissions will vary for the types of administrator roles and case user roles you set up.

Role Permissions	
TextMap Admin Options	**TextMap User Options**
Administer any TextMap case	Create local cases
Administer any assigned TextMap cases	Open local cases
Administer server configuration	Administer local case staff
Alter any cases	Create replicas of SQL cases
Alter assigned cases	Create replicas of local cases
Alter any role	Synchronize replicas
Alter any SQL server	Import transcripts
Alter any user	Update transcripts
Connect Admin Console	Delete transcripts
Create TextMap case	Edit transcript properties
Create role	Export transcripts
Create SQL Server	Create annotations
Create user	Edit other users' annotations
Delete any TextMap case	Change annotations' owner
Delete any role	Save search for all case users
Delete any SQL Server	Edit searches created by other users
Delete any user	Edit case synonyms
Export any TextMap case replica	Create transcript groups
Export assigned TextMap case replicas	Edit groups created by other users
	Administer case file viewers
	Edit case video paths

Role Permissions	
TextMap Admin Options	**TextMap User Options**
	Edit SQL case exhibits folder
	Manage case issues
	Manage linked documents
	Manage SQL case word index

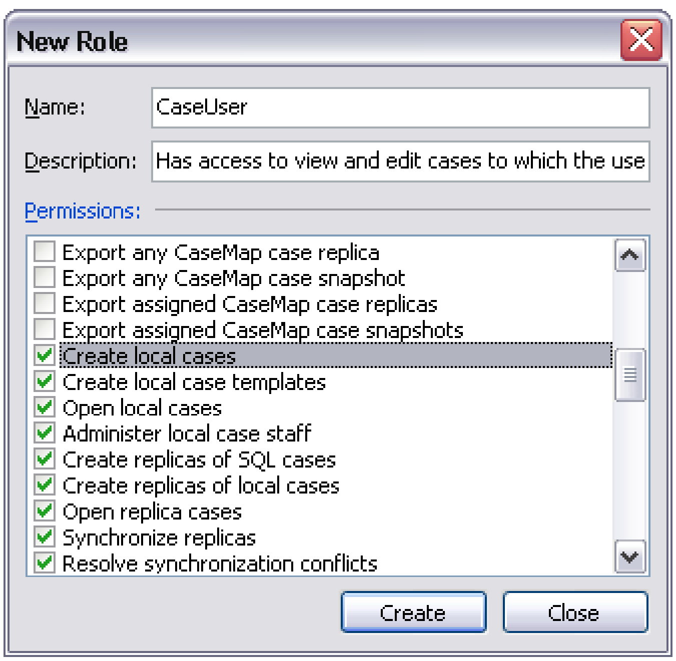
To create a role

1. In the **CaseMap Server** pane, click **Roles**.

   Or click on the View menu and then click Roles.

2. Click the **New Role** button on the toolbar.

3. In the **New Role** dialog box, type in the role name in the **Name** field.



4. In the **Description** field, type in the role description.

5. In the **Permissions** box, select the check boxes for the permissions you want this role to have.

6. Click **Create** to create the role.

   The new role now displays in the Roles pane.

7. Continue to create roles with varying permissions until you have the templates you need to create users.

8. Click **Close** when you are finished.

> You can also verify any disabled permissions for a user in either CaseMap or TextMap by clicking the Help menu, then clicking About LexisNexis CaseMap/TextMap, and clicking the Disabled Features button.

To add/remove users to a role

1. In the **CaseMap Server** pane, click **Roles**.

   Or click on the View menu and then click Roles.

2. Click on the role you for which you want to view properties.

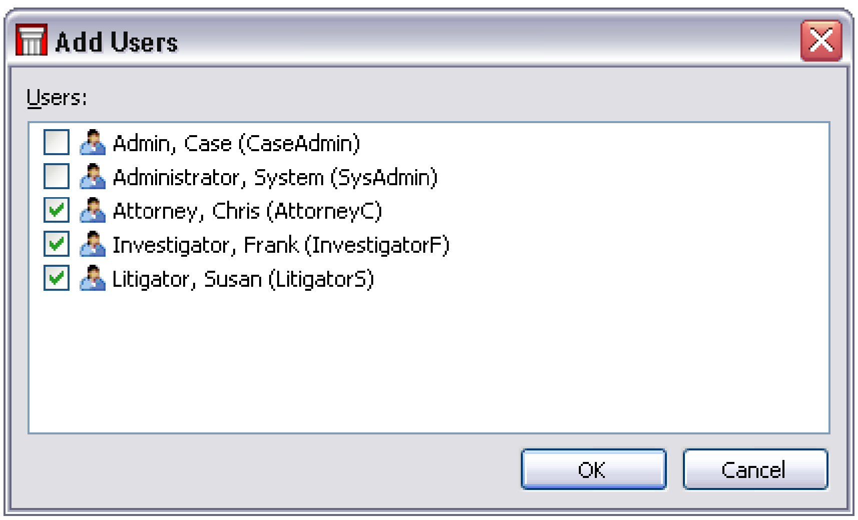
3. Click the **Role Properties** button.

   Or click on the Action menu and then click Role Properties.

4. In the **Role Properties** dialog box, click on the **Users** tab.

5. Click the **Add** button to add a user account to this role.

6. In the **Add Users** dialog box, select the user account, then click **OK**.



   The selected user(s) now display in the Users tab in the Role Properties dialog box.

7. To remove a user from a role, select the users in the **Users** tab, then click the **Delete** button.

To rename a role

1. In the **CaseMap Server** pane, click **Roles**.

   Or click on the View menu and then click Roles.

2. Click on the role you want to rename.

3. On the **Action** menu, click **Rename**.

4. In the **Rename** dialog box, type in the new role name, then click **OK**.

The selected role now displays the new name.

To delete a role

1. In the **CaseMap Server** pane, click **Roles**.

   Or click on the View menu and then click Roles.

2. Click on the role you want to delete.

3. Click the **Delete** button.

   Or click on the Action menu and then click Delete.

4. In the message box, click **Yes** to confirm the action.

   The selected role is now permanently deleted from the case database.

⚠ Deleted roles are permanently removed from the case. When a role is deleted all assignments of case users for this role are also deleted.

To view role properties

1. In the **CaseMap Server** pane, click **Roles**.

   Or click on the View menu and then click Roles.

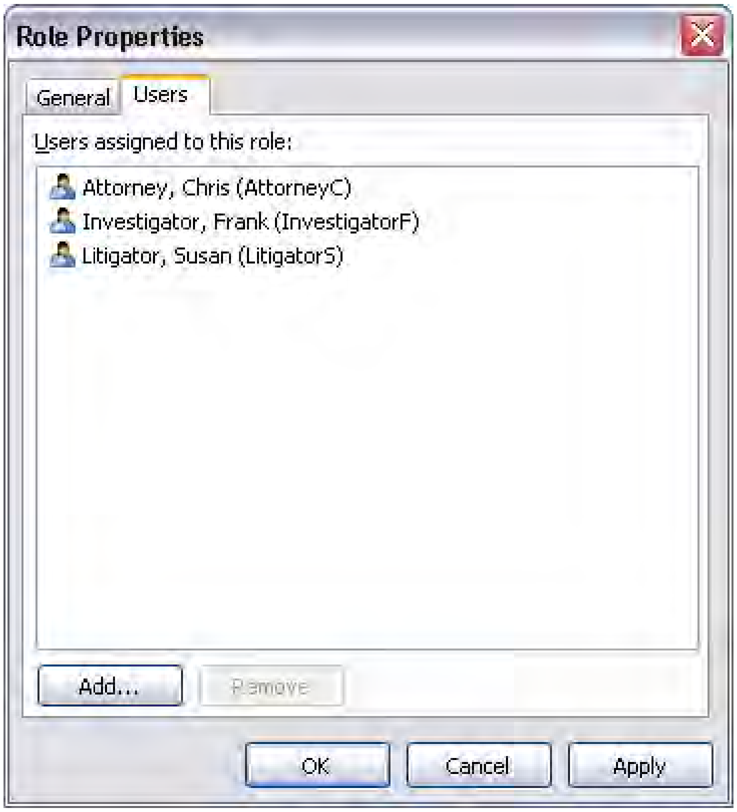
2. Click on the role you for which you want to view properties.

3. Click the **Role Properties** button.

   Or click on the Action menu and then click Role Properties.

4. In the **Role Properties** dialog box, click on the **General** tab to view a role description and assigned permission levels.

5. Click on the **Users** tab to view a listing of user accounts created with this role.



8. Click **OK** when you are finished.

To export a list of roles

1. In the **CaseMap Server** pane, click on **Roles**.

2. Click the **Export list** button.

3. In the **Save As** dialog box, locate the folder where you want to save the exported role list, then click **Save**.

4. In the message box to confirm the export and view the saved file, click **OK**.

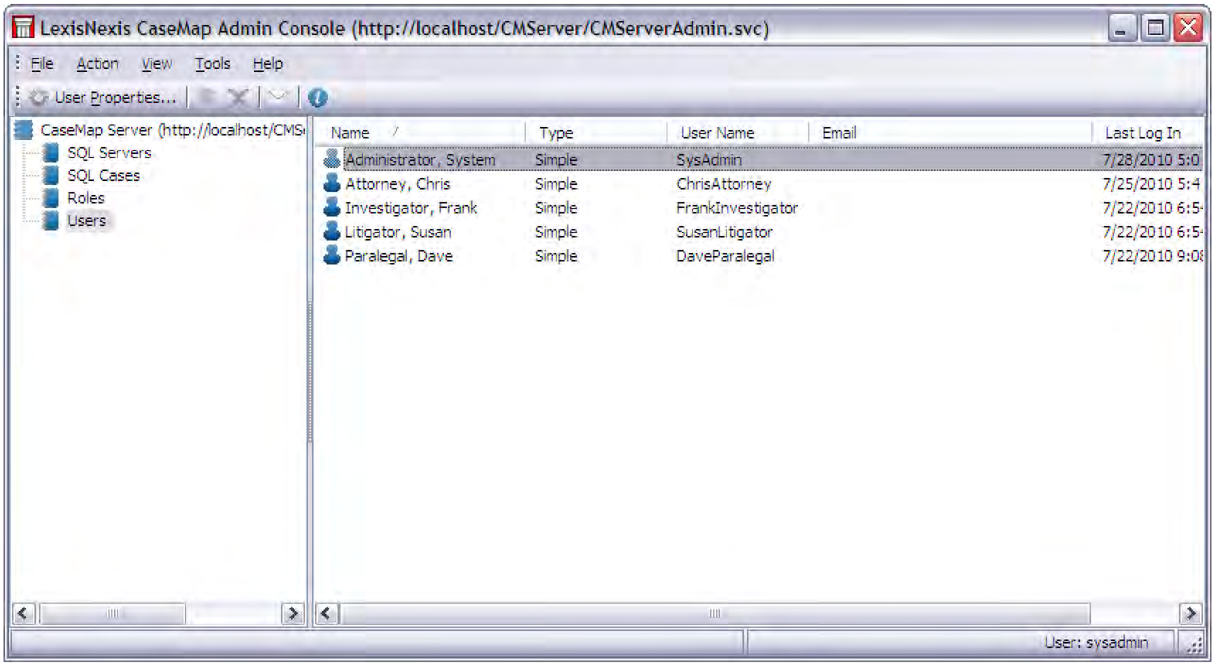
   The exported role list is now saved in a directory folder so you may reference it later using Microsoft® Excel.

Related Topics

About roles and users
Creating users in the Admin Console
Mapping users

Creating users

The Users pane allows you to view a complete listing of CaseMap and TextMap users set up in the CaseMap Admin Console. Once users are set up, you must assign them to a role to apply the appropriate permissions. Permissions are global settings and apply to all case files assigned to the user. Users must be assigned to the cases they need to access.



Use the Users pane to:

- View a complete listing of users
- Create new users
- Select password settings
- Change authentication types
- Rename users
- Disable user accounts
- Delete users
- Refresh the user list
- Export a list of users
- View or modify user properties
- Email user notifications

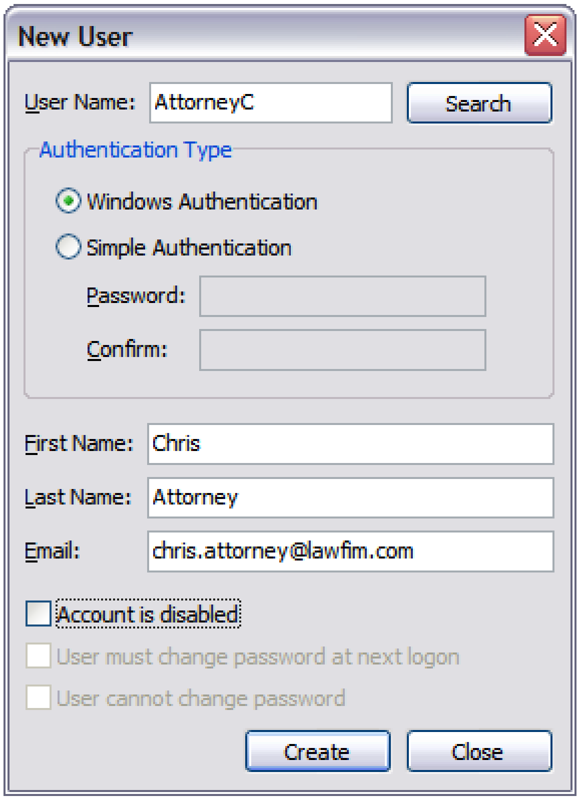
To create a user using Windows Authentication

1. In the **CaseMap Server** pane, click **Users**.

2. Click the **New User** button on the toolbar.

3. In the **New User** dialog box, type in the user name in the **User Name** field.

   Or, click the Search button to locate a user in Active Directory.



4. In the **Authentication Type** area, select **Windows Authentication** if you are using Active Directory.

5. Verify the user's name and email address.

6. Click the **Create** button to create the user account.

   The new user's name now displays in the Users listing.

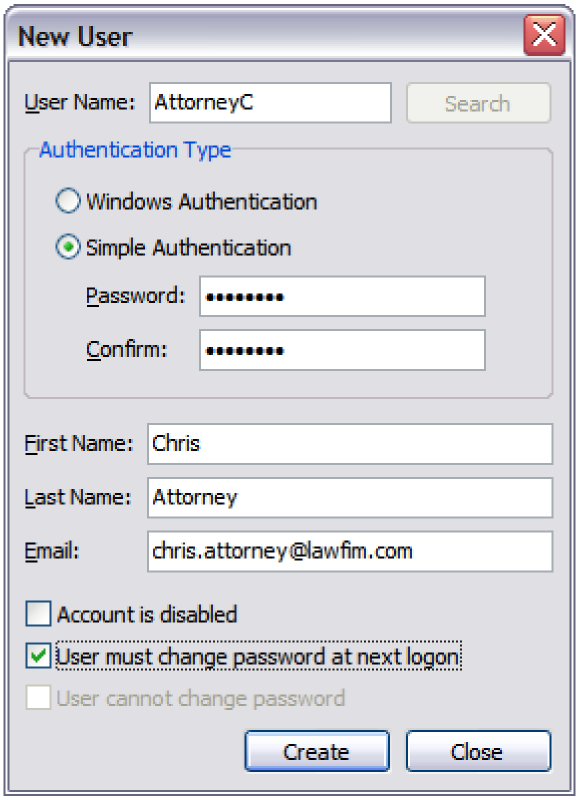
7. Click **Close** when you are finished.

To create a user using Simple Authentication

1. In the **CaseMap Server** pane, click **Users**.

2. Click the **New User** button on the toolbar.

3. In the **New User** dialog box, type in the user name in the **User Name** field.



4. In the **Authentication Type** area, select **Simple Authentication** if you are using a CaseMap logon.

5. In the **Password** and **Confirm** fields, type in the user's CaseMap password and confirm it.

6. Select check boxes for the password settings you want to apply.

   - Account is disabled
   - User must change password at next login
   - User cannot change password

7. Click the **Create** button to create the user account.

   The new user's name now displays in the Users listing.

8. Click **Close** when you are finished.

To bulk import users from an Active Directory group

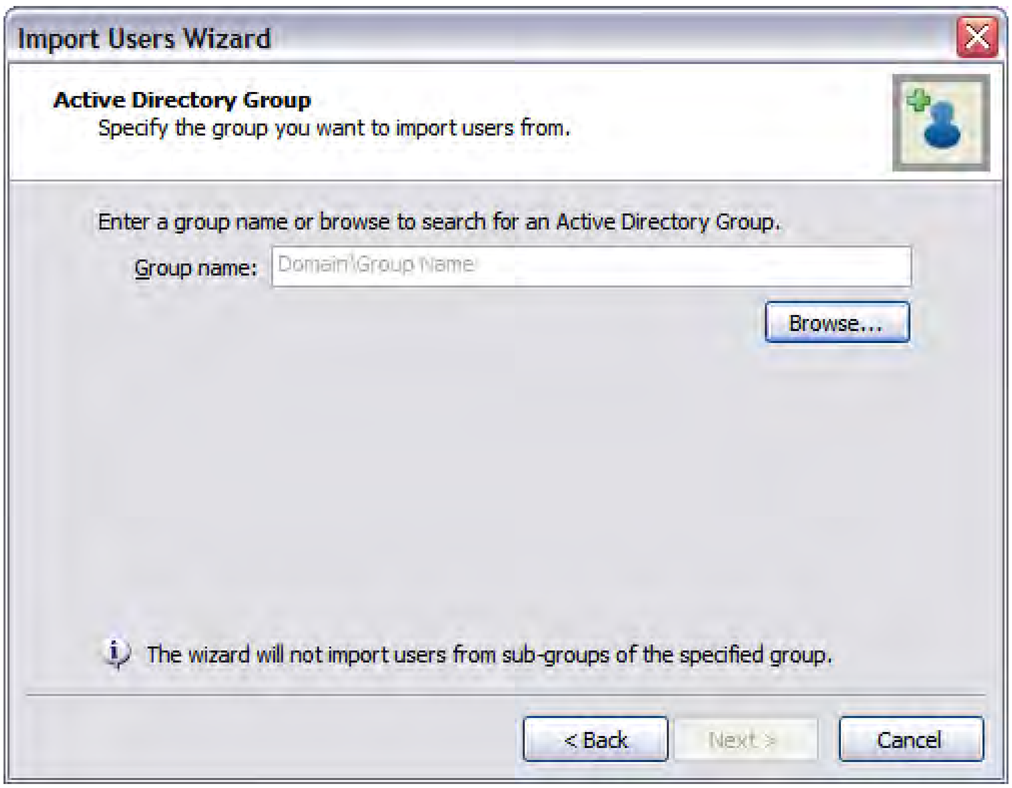
You can bulk import users from an Active Directory group using the Import Users Wizard. The wizard allows you to search for individuals by domain group, but you can also run common queries to locate a specific group. Once users are verified in Active Directory, the wizard allows you the option of assigning them to roles already created in the CaseMap Admin Console. You can also wait and assign users to roles after the import process completes.

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 too during this process. Existing CaseMap Server users will not be duplicated during the import. If you cancel the query during the import process, only users successfully imported at that point will be added.

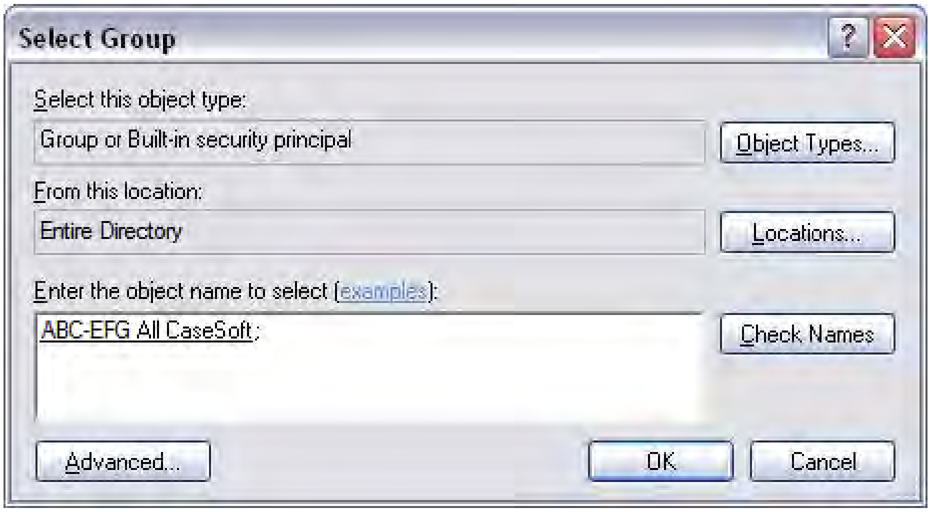
1. In the **CaseMap Server** pane, click **Users**.
2. On the **Action** menu, click **Import Users**.

   You can also right-click on Users and select Import Users.
3. When the **Import Users Wizard** launches, click **Next**.
4. On the **Active Directory Group** page, type in the domain and group name of the Active Directory group for which you want to import users.

   The wizard will not import users from sub-groups of the specified group.



5. Click the **Browse** button to open the **Select Group** dialog box and search for a group.



6. Click the **Object Types** button to select the types of objects you want to find, then click **OK**.

7. Click the **Locations** button to select the directory location you want to search, then click **OK**.

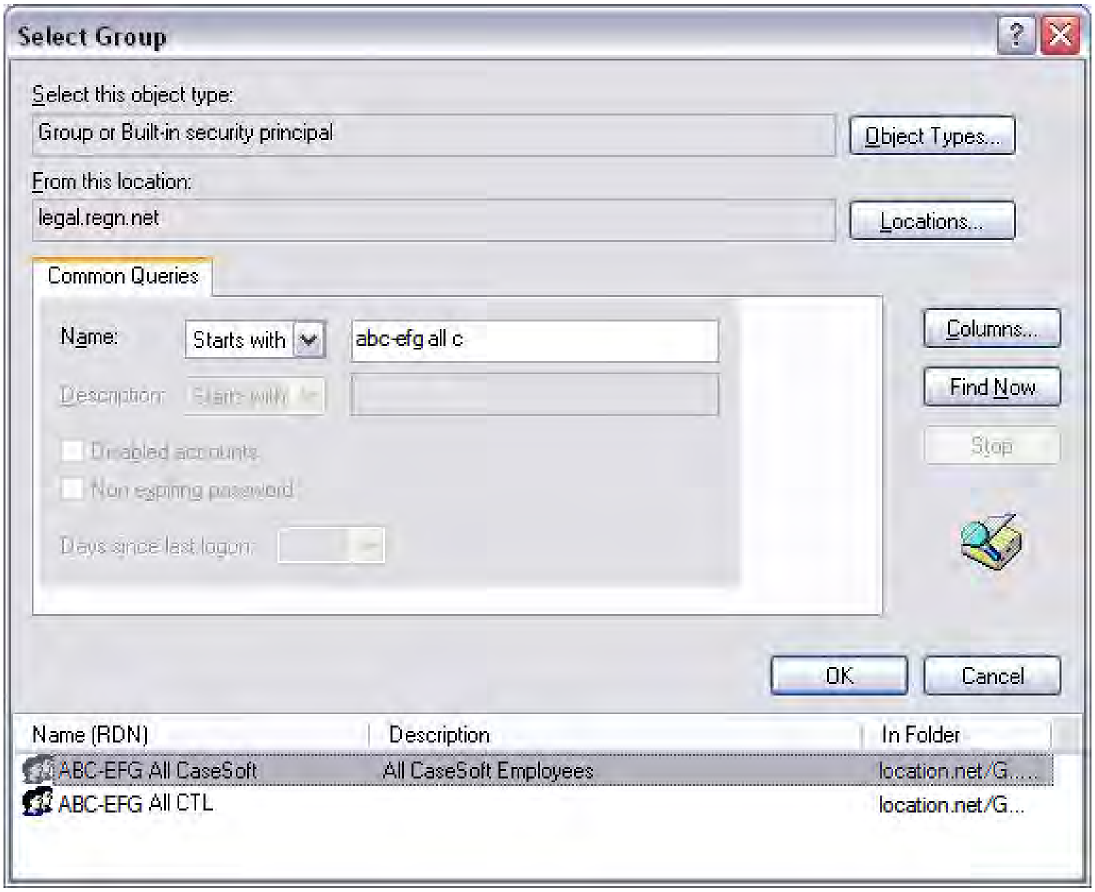
8. In the **Enter the object name to select** box, type in the group name that you want to locate.

9. Click the **Check Names** button to verify the object in Active Directory.

To run common queries to locate users

1. Click the **Advanced** button if you want to run a common query to locate users.

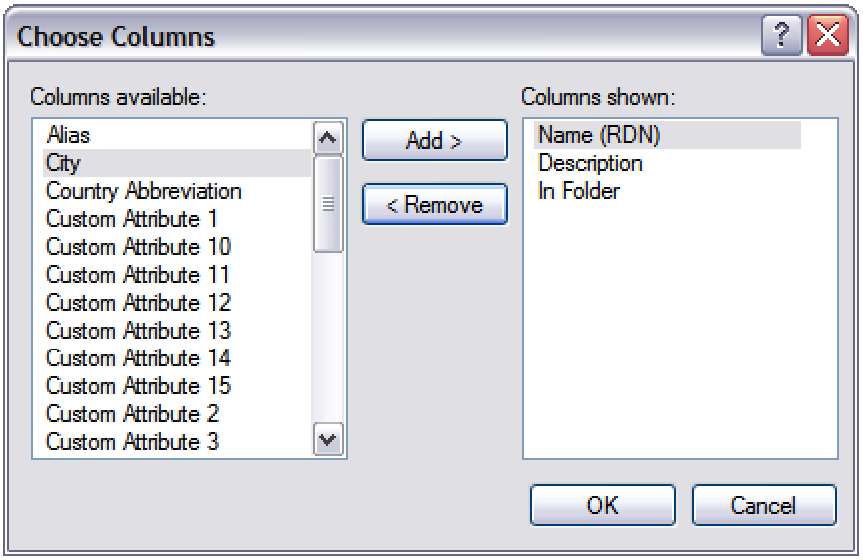
   The Select Group dialog box now displays a Common Queries section.



2. In the **Name** list, select **Starts with** or **Is exactly** for how you want to search for a group.

3. Type in the group name in the box.

4. If you want to add additional columns to the search results, click the **Columns** button.



5. In the **Columns** available box, select the column you want and click the **Add** button, then click **OK**.

   Select columns in the Columns shown box and click Remove to remove them the display results.

6. Click the **Find Now** button to run the query.

7. In the **Common Query Results** box, click on the group you want, then click **OK** to add it to the **Select Group** dialog box.

8. Click the **Stop** button to cancel the query, if needed.

9. In the Common Queries **Results** box, click the group you want to import, then click **OK**.

   The group now displays in the Select Group dialog box.

10. Click the **Next** button to validate the group.

11. The **Processing Group** page displays the search progress and the number of users found.

12. On the **Users to Import** page, select the check box for each user you want to import, then click **Next**.

    Select the Select All check box to import all users in the specified group.

13. On the **Assign Roles** page, select the check box for the role you want to assign to imported users, then click **Next**.

You can also wait to assign roles in the CaseMap Admin Console after the import.

14. In the **Ready to Import** page, verify the number of users and roles, then click **Next**.

15. On the **Completing the Import Users Wizard** page, verify the number of users successfully imported and/or skipped, then click **Finish**.

The number of existing CaseMap Admin Console users will display as skipped. In addition, the number of any users who were skipped to due errors are also displayed on this page.

Imported users now display in the Users pane of the CaseMap Admin Console. You can now assign users to roles and cases.

To change a user password

If you are using simple authentication for CaseMap security, you can easily change a user password. Passwords are global for all cases accessed in the CaseMap Server.

1. In the **CaseMap Server** pane, click **Users**.
2. Select the user for whom you want to reset a password.
3. On the **Action** menu, click **Set password**.

   Or, right-click on the user and click Set password.
4. In the **Set password** dialog box, type in the new password and confirm it.

5. Select the **Email user with new password** check box to send the user the new password information.

6. Click **OK** when you are finished.

   The user's case password is immediately updated.

   A Microsoft Outlook email template opens addressed to the user. The email body contains pre-written text that you can modify with your own message.

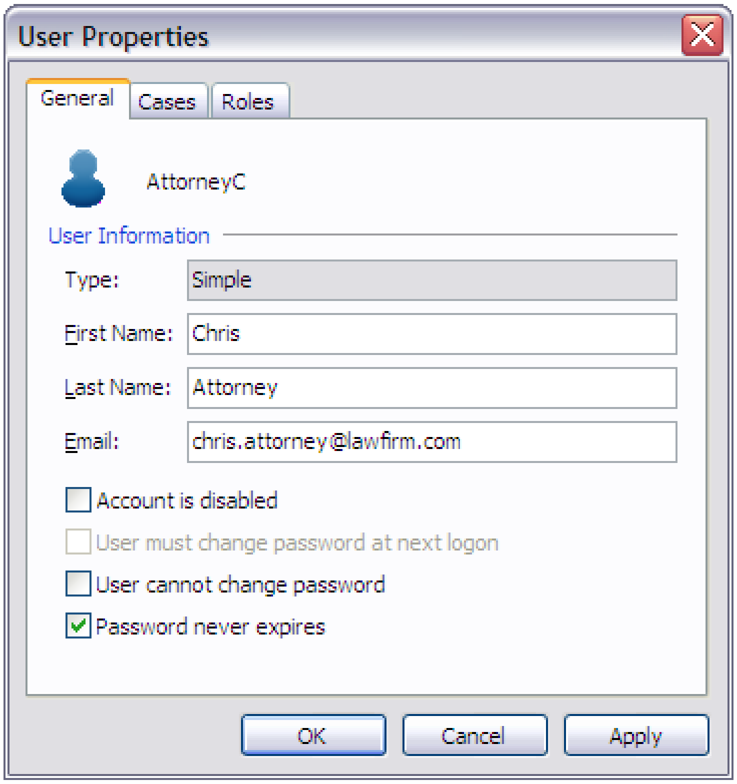
To view or modify user properties

1. In the **CaseMap Server** pane, click **Users**.

2. Select the user for whom you want view/modify account properties.

3. Click the **User Properties** button.

   Or, click on the Action menu and then click User Properties.



4. In the **User Properties** dialog box, click on the **General** tab to view user information and modify password settings.

5. Click on the **Cases** tab to view, add, or remove case files assigned to the user.

6. Click on the **Roles** tab to view, add, or remove roles assigned to the user.

7. Click **OK** to save your changes.

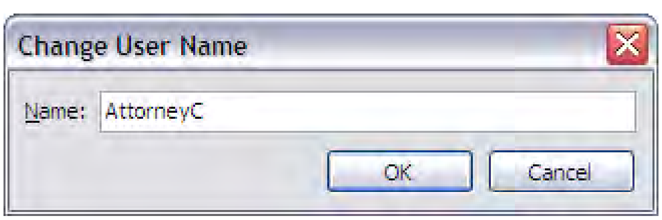
To rename a user

1. In the **CaseMap Server** pane, click **Users**.

2. Right-click on the user account you want to rename, then click **Change user name**.

   Or, click on the Actions menu and click Change user name.

3. In the **Change User Name** dialog box, type in the new user name, then click **OK**.



The User Name field in the User pane is now updated to reflect the change.

Notice that the Name and Email field data remains the same. To update this information, see To view or modify user properties.

To deactivate a user

1. In the **CaseMap Server** pane, click **Users**.
2. Select the user for whom you want deactivate the account.
3. Click the **User Properties** button.

   Or, click on the Action menu and then click User Properties.
4. Select the **Account is disabled** check box, then click **OK**.

   The user can no longer access assigned case files in the CaseMap Server.

   To re-activate the user account, simply deselect the Account is disabled check box.

To delete a user

1. In the **CaseMap Server** pane, click **Users**.
2. Select the user for whom you want delete the account.
3. Click the **Delete** button on the toolbar.

   Or, right-click and then click Delete or select Delete from the Action menu.
5. In the message box to delete the users, click **OK**.
6. In the message box to confirm the action, click **Yes**.

   The user account can no longer access assigned cases and the user no longer displays in the Users pane listing.

To change a user's authentication type

If you inadvertently added a user with the wrong authentication type, or you added a user to Active Directory after adding the user here, you can change how the user logs in.

1. In the **CaseMap Server** pane, click **Users**.
2. Select the user for whom you want change the authentication type.
3. On the **Action** menu, click **Change Authentication Type**.

   Or, right-click on the user and click Change Authentication Type.
4. In the **Change Authentication Type** dialog box, type in the user name.
5. Click the **Search** button, if you are changing the user from simple authentication to Windows authentication.
6. Click **OK** to save the change.

   The user's new authentication type now displays in the Users list.

To email a user

If users are logged into a case and you need them to exit it to perform administrative tasks, simply send them an email to alert them of when and why they need to log out of the case file.

1. In the **CaseMap Server** pane, click **Users**.
2. Select the user for whom you want to send an email.
3. Click the **Email user** button on the toolbar.

   Or, right-click on the user and click Email user or select this option from the Action menu.

   A Microsoft Outlook email template opens addressed to the user. The email body contains pre-written text that you can modify with your own message.

To export a list of users

1. In the **CaseMap Server** pane, click on **Users**.
2. Click the **Export list** button.
3. In the **Save As** dialog box, locate the folder where you want to save the exported user list, then click **Save**.
4. In the message box to confirm the export and view the saved file, click **OK**.

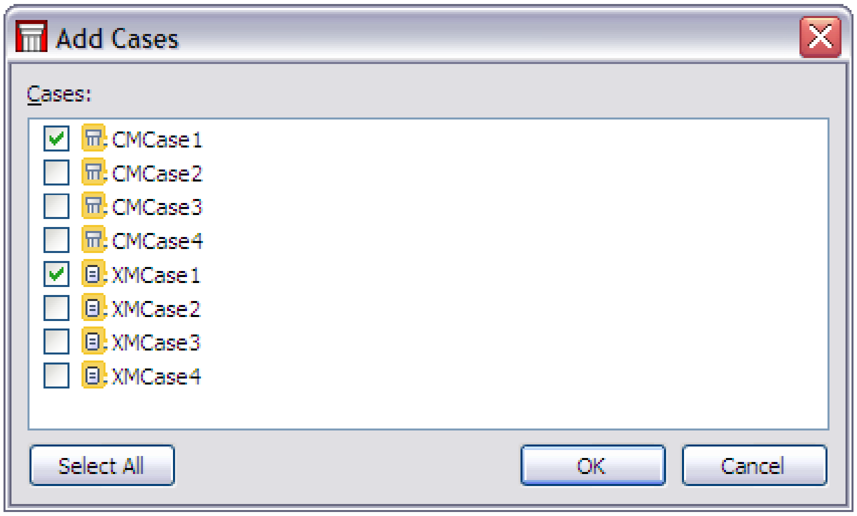
   The exported user list is now saved in a directory folder so you can reference it later using Microsoft Excel.

To assign a user to a case

1. In the **CaseMap Server** pane, click **Users**.
2. Select the user for whom you want to assign to a case.
3. Click the **User Properties** button.

   Or, click on the Action menu and then click User Properties.

4. In the **User Properties** dialog box, click on the **Cases** tab.
5. Click the **Add** button.
6. In the **Add Cases** dialog box, select the check box for each case you want to assign to the user, then click **OK**.



Click the Select All button to assign the user to all cases.

The selected cases now display in the Cases tab for that user.

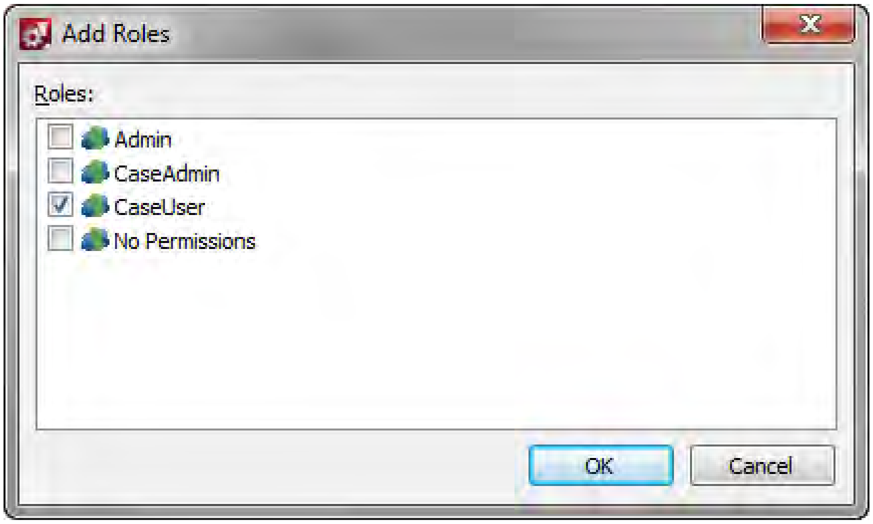
To remove a case from the user account, select it and then click the Remove button.

7. Click **OK** when you are finished.

To assign a user to a role

1. In the **CaseMap Server** pane, click **Users**.
2. Select the user for whom you want to assign to a case.
3. Click the **User Properties** button.

   Or, click on the Action menu and then click User Properties.
4. In the **User Properties** dialog box, click the **Roles** tab.
5. In the **Add Roles** dialog box, select the check box for the role you want to assign to the user, then click **OK**.



The selected role now displays in the Roles tab for that user.

To remove a role from the user account, select it and then click the Remove button.

6. Click **OK** when you are finished.

Related Topics

[About roles and users]()
[Creating roles]()
[Mapping users]()

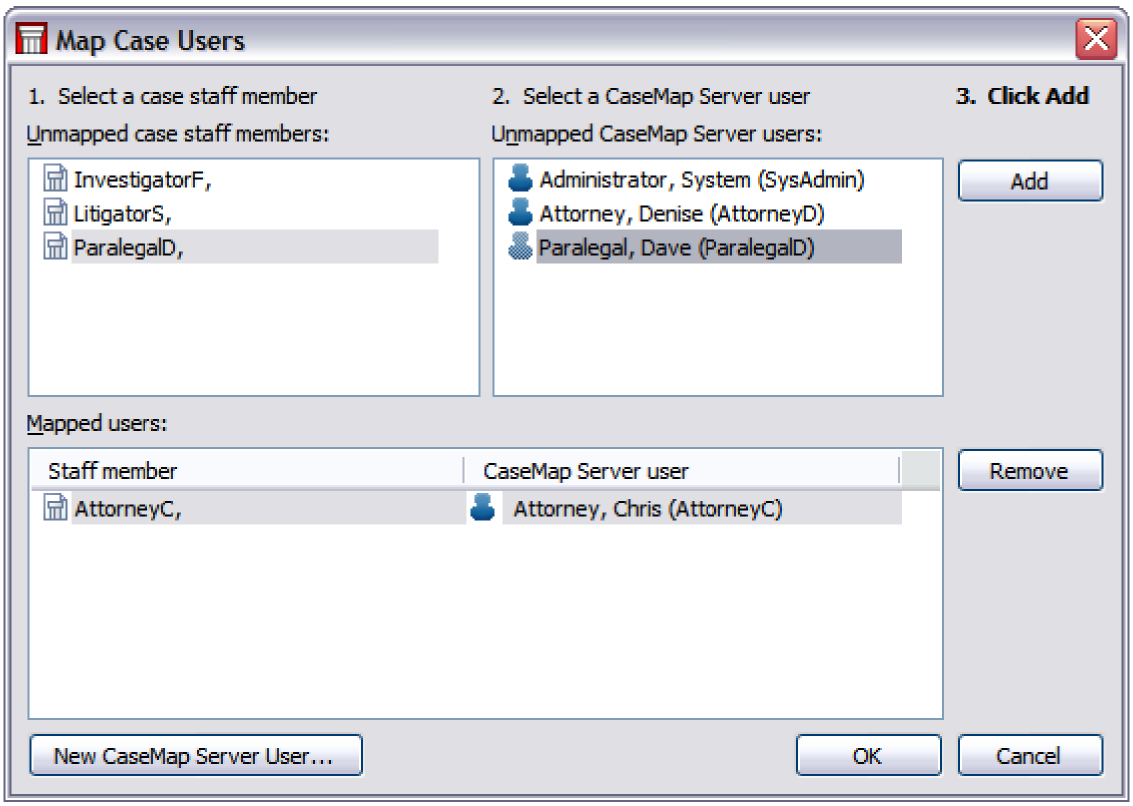
Mapping users

Migrating an existing CaseMap or TextMap case to CaseMap Server is two-step process. First you import the existing case using the SQL Import Utility and then 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 case. 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 in the CaseMap Admin Console, they should automatically be assigned to the case and able to open the case in CaseMap or TextMap. Users set up in the CaseMap Admin Console must match the user account in the client version of the local case (CaseMap > Tools > Manage Case Staff or TextMap > Tools > Case Staff). You can also add new users to the SQL case while mapping users. Click the New CaseMap Server User button to access the New User dialog box.

Mapping user considerations:

- If you do not map users after registering an imported case, this task can be completed later in the CaseMap Admin Console by selecting the SQL case, clicking the Action menu, and then clicking Map Case Staff Members.
- If there are no non-mapped users, a message box displays stating that all users in the original case have been mapped. This message box will not display any CaseMap Server users that are already mapped to the case database.
- If there are no users in the case when you register it, no message displays regarding whether to map users. If you right-click on the case without users, a message will display indicating that you need to assign users to a case.
- The bottom list of mapped users remains empty and is only populated when you select a user combination and click the Map Users button.



Example of the mapping user process:

Refer to the above graphic for the examples noted below.

- AttorneyC and ParalegalD are existing case staff that can be successfully mapped when an existing case is registered, because they already have user accounts set up in the CaseMap Admin Console.
- InvestigatorF and LitigatorS are existing case staff that need user accounts set up in the CaseMap Admin Console before they can be mapped and access the new SQL case version.

- SysAdmin and AttorneyD already have user accounts set up in the CaseMap Admin Console, but need to be assigned to the new SQL case, once it is registered, in order to access it.

To map case users

1. In the **CaseMap Server** pane, click **SQL Cases**.
2. Right-click on a case and click **Map Case Staff Members**.

   Or click on the Action menu and select Map Case Staff Members.
3. In the **Map Case Users** dialog box, select a user in **Unmapped case staff members** box.
4. In the **Unmapped CaseMap Server users** box, select the same user name, then click **Add**.

   The user now displays in the Mapped users box.
5. Click the **New CaseMap Server User** button if you want to add a new user to the SQL case file at this time.

   New users added display in the Unmapped CaseMap Server users list so they can be mapped.

   For more information, see Creating users.
6. Continue mapping case users until you are finished.
7. Click **OK** to save the users.

   The mapped users can now access the SQL case version of this case.

   Remember to assign users to roles. See Creating roles.

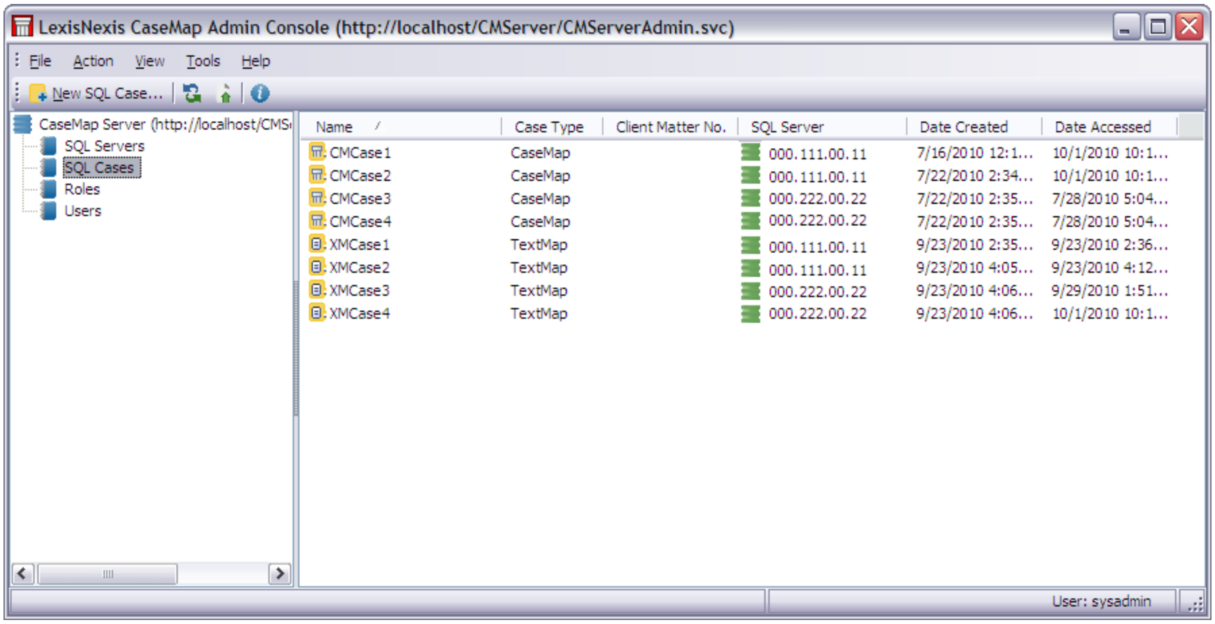
Related Topics

Migrating case files to CaseMap Server
Registering existing case files
About roles and users
Creating users in the Admin Console

Managing SQL Cases

Managing SQL cases

The SQL Cases pane allows you to set up CaseMap or TextMap cases on an SQL Server. Here you see a complete listing of all SQL cases which includes the name, case type, client matter number, the server where the case resides, the date created and the date accessed. In this pane, you can manage the state of each case, as well as assign and notify case users.



Use the SQL Cases pane to:

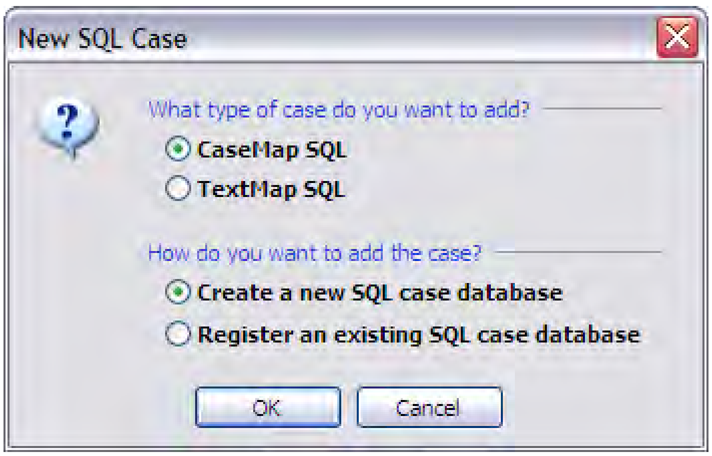
- View a complete listing of registered SQL cases
- Create new SQL case databases
- Register existing SQL case databases
- Map case staff
- Test case connectivity
- Refresh the case list
- Sort column data
- Change the server for a case
- Rename cases
- Edit case properties
- Deactivate cases
- Delete cases
- Email all assigned users for a case
- Export a list of cases
- Export a case database

This section only addresses managing SQL cases. Users can optionally create local cases, just as in prior versions of CaseMap or TextMap. For more information, see the CaseMap or TextMap help systems.

To create a new CaseMap SQL case

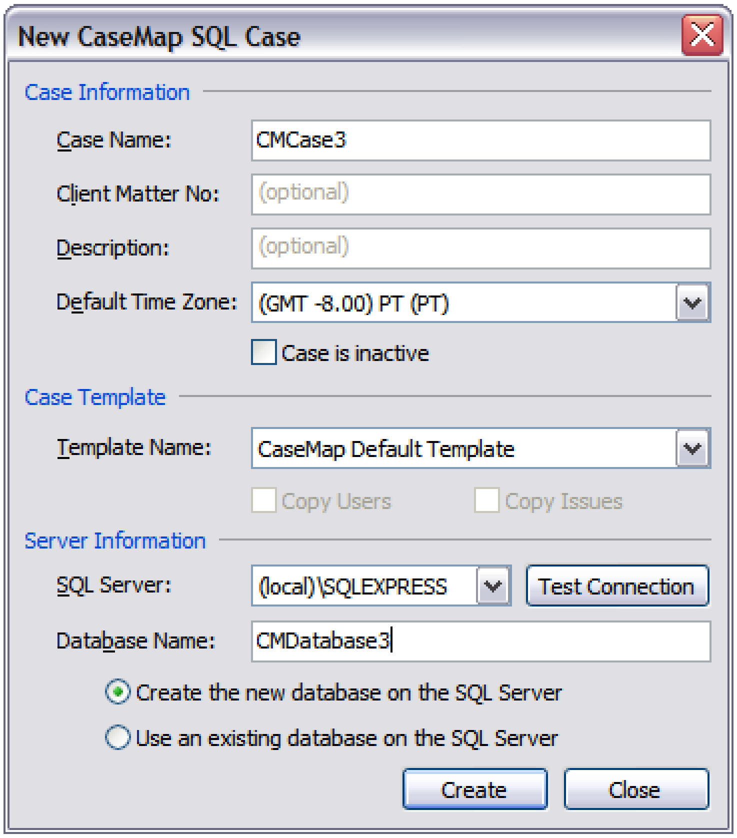
Each CaseMap case is stored in its own SQL Server database. You cannot have multiple cases stored in the same database, and each case must have a unique name. You can create new cases as well as register existing cases that you have imported from prior versions of CaseMap.

1. In the **CaseMap Server** pane, click **SQL Cases**.
2. Click on the **New SQL Case** button on the toolbar.
3. In the **New CaseMap SQL Case** dialog box, select **CaseMap SQL**.
4. Next select **Create a new SQL case database**, then click **OK**.



5. In the **New CaseMap SQL Case** dialog box, type in a name for the case in the **Case Name** field.

   The maximum case name is 100 characters.



6. In the **Client Matter No.** field, type in the client matter number (optional).

   The maximum client matter number is 100 characters.

7. In the **Description** field, type in a case description (optional).

   The maximum description is 200 characters.

8. In the **Default Time Zone** drop-down listing, click on the time zone where most of the case events occur.

9. In the **Template Name** field, select the CaseMap template you want to use to create the SQL case.

   The CaseMap Default Template is used if you have not created any CaseMap templates.

   For more information, see Creating SQL cases from CaseMap templates.

10. In the **SQL Server** drop-down listing, select the SQL Server that will host or store this case.

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

    The maximum SQL database name is 128 characters.

12. Select whether to use a new database or an existing, empty database:

    - Create the new database on the SQL Server

- Use an existing empty database on the SQL Server

12. Click the **Test Connection** button.

13. In the message box to confirm the connection, click **OK**.

14. Click the **Create** button to create the case.

15. In the message box, click **OK** to continue.

    The case now displays in the SQL Cases pane.

14. Continue creating SQL cases, as needed.

15. Click **Close** when you are finished.

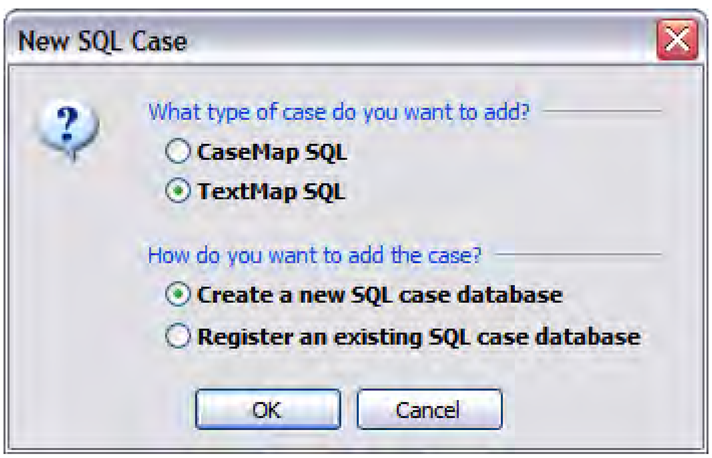
To create a new TextMap SQL case

Each TextMap case is stored in its own SQL Server database. You cannot have multiple cases stored in the same database, and each case must have a unique name. You can create new cases as well as register existing cases that you have imported from prior versions of TextMap.

1. In the **CaseMap Server** pane, click on **SQL Cases**.

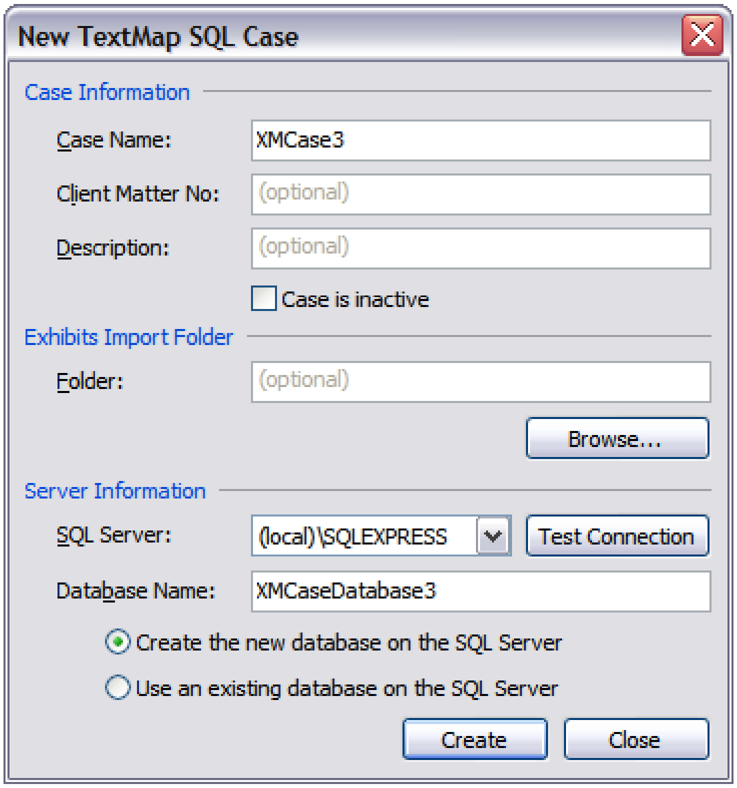
2. Click on the **New SQL Case** button on the toolbar.

3. In the **New SQL Case** dialog box, select **TextMap SQL**.



4. Next select **Create a new SQL case database**, then click **OK**.

5. In the **New TextMap SQL Case** dialog box, type in a name for the case in the **Case Name** field.



The maximum case name is 100 characters.

6. In the **Client Matter No.** field, type in the client matter number (optional).

   The maximum client matter number is 100 characters.

7. In the **Description** field, type in a case description (optional).

   The maximum description is 200 characters.

8. In the **Exhibits Import Folder** area, type in the path name to the exhibits folder you want to import or click **Browse** (optional).

9. In the **Browse for Folder** dialog box, select the file path to the exhibits folder you want, then click **OK**.

10. In the **SQL Server** drop-down listing, select the SQL Server that will host or store this case.

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

    The maximum SQL database name is 128 characters.

12. Select whether to use a new database or an existing, empty database:

    - Create the new database on the SQL Server
    - Use an existing empty database on the SQL Server

13. Click the **Test Connection** button.

14. In the message box to confirm the connection, click **OK**.

15. Click the **Create** button to create the case.

16. In the message box, click **OK** to continue.

    The case now displays in the SQL Cases pane.

17. Continue creating SQL cases, as needed.

18. Click **Close** when you are finished.

To register an existing SQL case

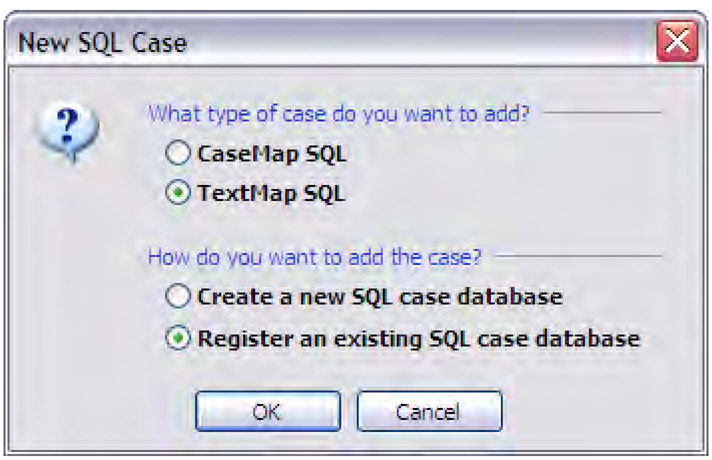
Registering an existing SQL case file in the CaseMap Admin Console allows you to register a previous version (CaseMap or TextMap) case that you migrated into the SQL Server, but does not yet display in the SQL Cases pane. Cases are registered individually using the CaseMap or TextMap SQL Import Utility. Case names must be unique.

Case databases can also be unregistered. Unregistering a case does not delete the database file; it simply stops the CaseMap Server from serving it. If you later decide to re-register the case, it will be assigned a new and unique internal ID. Users assigned to an earlier version of the case will not be able to access it when it is re-registered until they are re-assigned to the case.

1. In the **CaseMap Server** pane, click on **SQL Cases**.

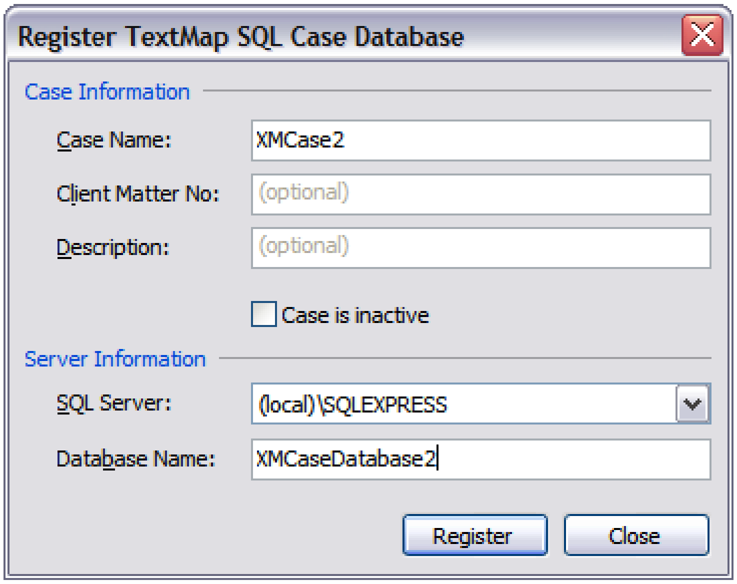
2. Click on the **New SQL Case button** on the toolbar.

3. In the **New SQL Case** dialog box, select the type of case you want to create: **CaseMap SQL** or **TextMap SQL**.



4. Next select **Register an existing CaseMap SQL case database.**

5. Click **OK** to open the **Register TextMap SQL Case Database** dialog box.



This dialog box is named Register CaseMap SQL Case Database, if you selected CaseMap SQL.

6. In the **Case Name** field, type in the case name.

   The maximum case name is 100 characters.

7. In the **Client Matter No.** field, type in the client matter number (optional).

   The maximum client matter number is 100 characters.

8. In the **Description** field, type in a case description (optional).

   The maximum description is 200 characters.

9. In the **SQL Server** drop-down list, select the SQL Server you want to connect with this case.

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

    The maximum SQL database name is 128 characters.

11. Click **Register** to register the case.

    The case now displays in the SQL Cases pane.

12. In the **Map Case Users** dialog box, select a user in the **Unmapped case staff members** box.

13. Choose one of the following depending on the user account status:

    - If the user is already added as a user in the CaseMap Admin Console, select the same user name in the Unmapped CaseMap Server users box, then click Add.

      The user displays in the Mapped users box. For more information, see Mapping users.

    - If the user is not already added as a user in the CaseMap Admin Console, click the New CaseMap Server User button.

Complete steps for adding a new users. See Creating Users.

Next complete steps for mapping the user as mentioned in the above bullet.

Remember to assign users to roles. See Creating Roles.

14. Click **OK** to continue to save mapped users.

    The existing case is now registered with existing/new users mapped to user accounts in the CaseMap Admin Console.

To change the server for a case

We recommend that you only edit these values if you have moved or renamed a case database. Changing the SQL Server will not move or rename the SQL case database.

1. In the **CaseMap Server** pane, click on **SQL Cases**.
2. Right-click on the case you for which you want to change the server and click **SQL Case Properties**.

   You can also double-click on the SQL case or click on the Action menu and then click SQL Case Properties.
3. In the **SQL Case Properties** dialog box, click the **Change** button.
4. In the message box, click **OK**.
5. In the **SQL case Properties** dialog box, select a new SQL Server in the **SQL Server** drop-down listing.
6. Click the **Test Connection** button to ensure a connection to the new SQL Server.
7. In the message box to confirm the connection, click **OK**.
8. Click **OK** when you are finished.

To rename a case

1. In the **CaseMap Server** pane, click on **SQL Cases**.
2. Right-click on the SQL Case you want to rename and click **Rename**.

   You can also click the Action menu and then click Rename.
3. In the **Rename** dialog box, type in the new SQL case name, and then click **OK**.

   The new SQL case name now displays in the SQL Cases pane. The server list does not resort after a name change.

> The Rename dialog box allows you to use carriage returns to support manual line breaks in CaseMap report headers and title pages. A space is automatically added in the case name for each carriage return entered.

To edit case properties

At least one case must be listed in the SQL Cases pane in order to edit case properties.

1. In the **CaseMap Server** pane, click on **SQL Cases**.

2. Double-click on the SQL case for which you want to edit case properties.

   You can also click the Action menu and then click SQL Case Properties, or right-click on the case file and click SQL Case Properties.

3. In the **SQL Case Properties** dialog box, enter your edits.

4. Click **OK** to save your changes.

To deactivate a case

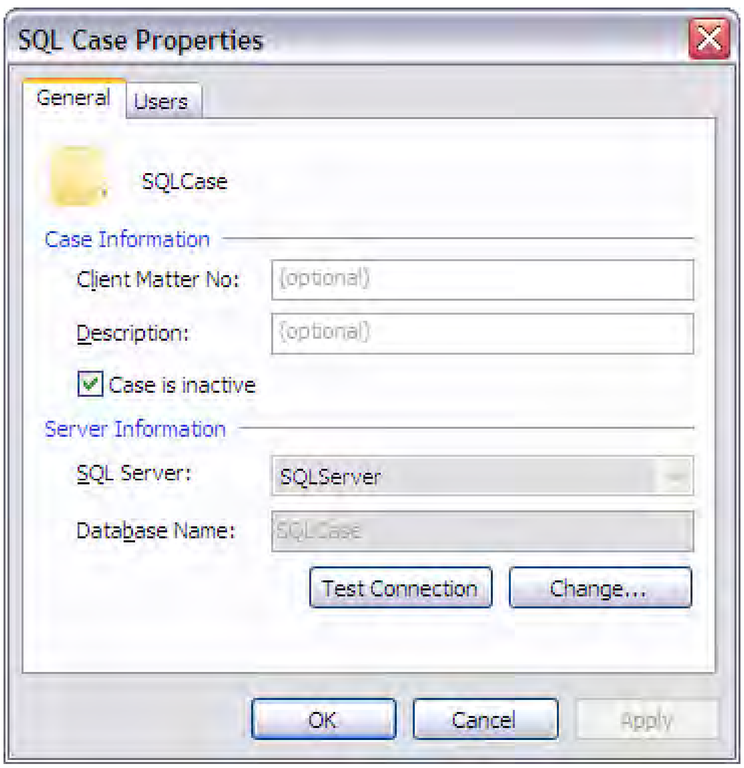
We recommend that you email all assigned case users before deactivating a case. When you deactivate a case, any users currently working in the case will not be kicked out. However, they will not be able to log back into the case once they close it.

1. In the **CaseMap Server** pane, click on **SQL Cases**.

2. Double-click on the SQL case you want to deactive.

   You can also click the Action menu and then click SQL Case Properties, or right-click on the case file and select SQL Case Properties.

3. In the **SQL Case Properties** dialog box, click on the **General** tab.



4. Select the **Case is inactive** check box.

5. Click **OK** or **Apply** to save the change.

   Users cannot logon to this case until you clear the Case is inactive check box.

To delete a case

Delete cases that case staff no longer need to access. When a case is deleted, it is no longer registered in the SQL Server database. The SQL Server database itself is not deleted.

We recommend that you email all assigned case users before deleting a case. When you delete a case, any users currently working in the case will not be kicked out. However, they will not be able to log back into the case once they close it.

Once a case is deleted, the action cannot be undone. For assistance with archiving the case file database, contact your SQL Server administrator.

1. In the **CaseMap Server** pane, click **SQL Cases**.

2. Select the case you want delete.

3. Click the **Delete** button on the toolbar.

   You can also right-click on the case and click Delete or select Delete from the Action menu.

4. In the message box, click **OK**.

5. In the message box to confirm the action, click **Yes**.

   The case no longer displays in the SQL Cases pane or the User Properties dialog box for those users assigned to the case.

To email all users assigned to a case

If users are logged into a SQL case and you need them to exit it to perform administrative tasks, simply send them an email to alert them of when and why they need to log out of it.

1. In the **CaseMap Servers** pane, click **SQL Cases**.

2. Select the case for which you want to send an email.

3. Click the **Generate a new email** button.

   Or, right-click on the case and click Email users assigned to case, or select this option from the Action menu.

   A Microsoft Outlook email template opens automatically addressed to the user. The email body contains pre-written text that you can modify with your own message.

To export a case list

An exported SQL case list is saved in a directory folder where you can reference it later using Microsoft® Excel. Both CaseMap and TextMap SQL cases display in the case list.

1. In the **CaseMap Server** pane, click on **SQL Cases**.

2. Click the **Export list** button .

3. In the **Save As** dialog box, locate the folder where you want to save the exported case list, then click **Save**.

4. In the message box to confirm the export and view the saved file, click **OK**.

To export a case database

Information about exporting case databases is addressed in the Replicating and Synchronizing Cases book in the Table of Contents.

To create SQL case replicas in the CaseMap Admin Console, see Creating replica SQL cases.

To create replicas of local or SQL cases in the client application:

- For CaseMap, see Creating replica cases.
- For TextMap, see Creating replica cases.

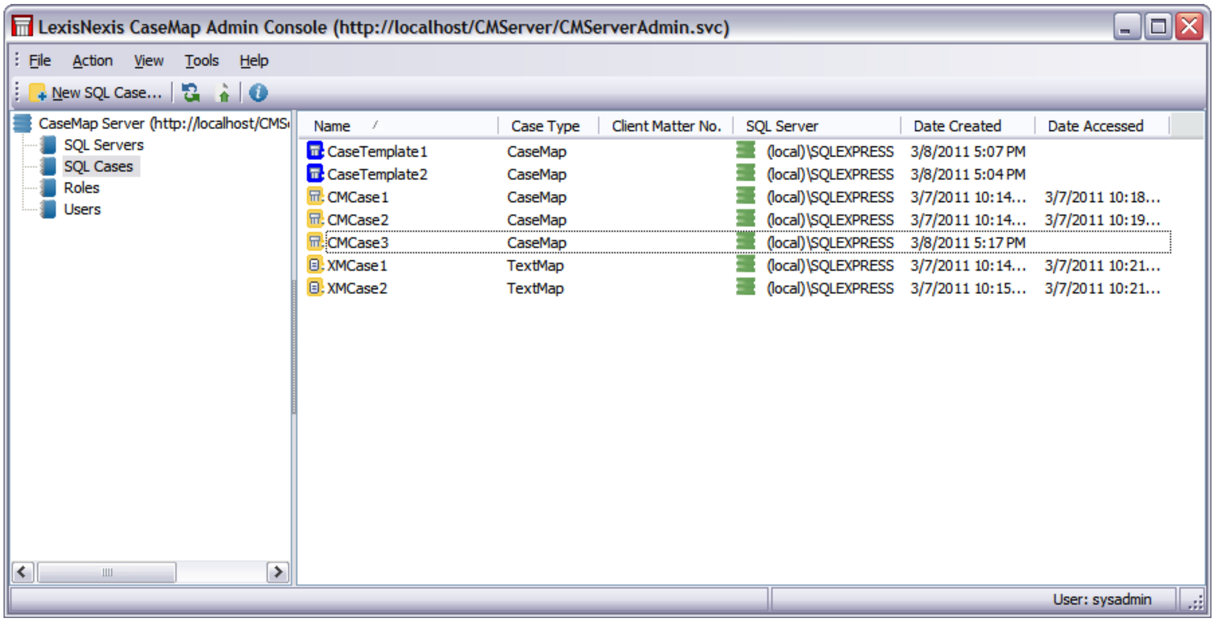
Related Topics

Registering SQL Servers
Registering CaseMap Servers
About roles and users

Creating SQL cases from CaseMap templates

If you are a CaseMap user, you can create a new SQL case from a CaseMap SQL template. This feature is similar to how you create cases from templates in CaseMap, but can now be done in the CaseMap Admin Console for SQL cases.

When you create a new SQL case from a CaseMap SQL case template, you have the option to copy case staff and/or case issues into the new case. If you choose to copy case staff, then each user's spreadsheet views, saved searches, and case/form preferences set in the template are copied into the new SQL case. No other spreadsheet data or settings can be copied from a case template.



CaseMap SQL case templates are identified by a blue icon, so you can easily identify them in the SQL Cases pane of the CaseMap Admin Console and distinguish them from individual SQL cases (yellow icon). Template names will also display in the Template Name drop-down listing in the New SQL Cases dialog box when new SQL cases are created.

Before you can start creating SQL case templates, you need to ensure that Microsoft SQL Server has been configured to support this functionality. For more information, see Configuring SQL Server for CaseMap templates.

Follow these steps to create SQL CaseMap templates:

- Configure SQL Server for CaseMap templates
- Create a new SQL case to be used as a template
- Mark the new SQL case as a template
- Create a new SQL case from the existing SQL case template

> You can use an existing CaseMap local case to create a SQL case template. Use the CaseMap SQL Import Utility to migrate the local case to the SQL case file format. Then register the case in the CaseMap Admin Console and mark it as a template. For more information, see Migrating case files to CaseMap Server and Managing SQL case files.

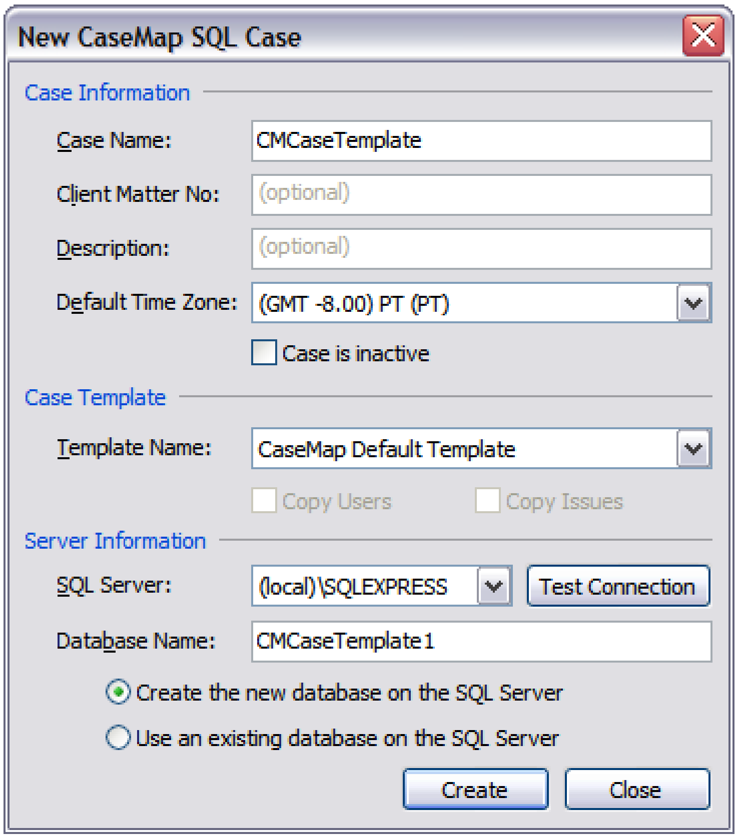
To create a SQL case for use as a SQL template

1. In the **CaseMap Server** pane, click on **SQL Cases**.
2. Click the **New SQL Case** button on the toolbar.
3. In the **New SQL Case** dialog box, select **CaseMap SQL**.

4. Next select **Create a new SQL case database** and then click **OK**.

5. In the **New CaseMap SQL Case** dialog box, type in a name for the new SQL case in the **Case Name** field.

   The maximum for a case name is 100 characters.



6. In the **Client Matter No.** field, type in the client matter number (optional).

   The maximum client matter number is 100 characters.

7. In the **Description** field, type in a case description (optional).

   The maximum description is 200 characters.

8. In the **Default Time Zone** drop-down listing, click on the time zone where most of the events in the case occur.

9. In the **Template Name** drop-down listing, click **CaseMap Default Template**.

   The CaseMap Default Template option displays by default until you have created one or more templates.

   Once new SQL cases are marked as templates, the template names will display in alphabetical order for selection in the Template Name drop-down listing.

10. In the **SQL Server** drop-down listing, select the SQL Server that will host or store this case.

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

    The maximum SQL database name is 128 characters.

12. Select whether to use a new database or use an existing database:
    - Create the new database on the SQL Server
    - Use an existing empty database on the SQL Server

13. Click the **Test Connection** button.

14. In the message box to confirm the connection, click **OK**.

15. In the message box, click **OK** to continue.

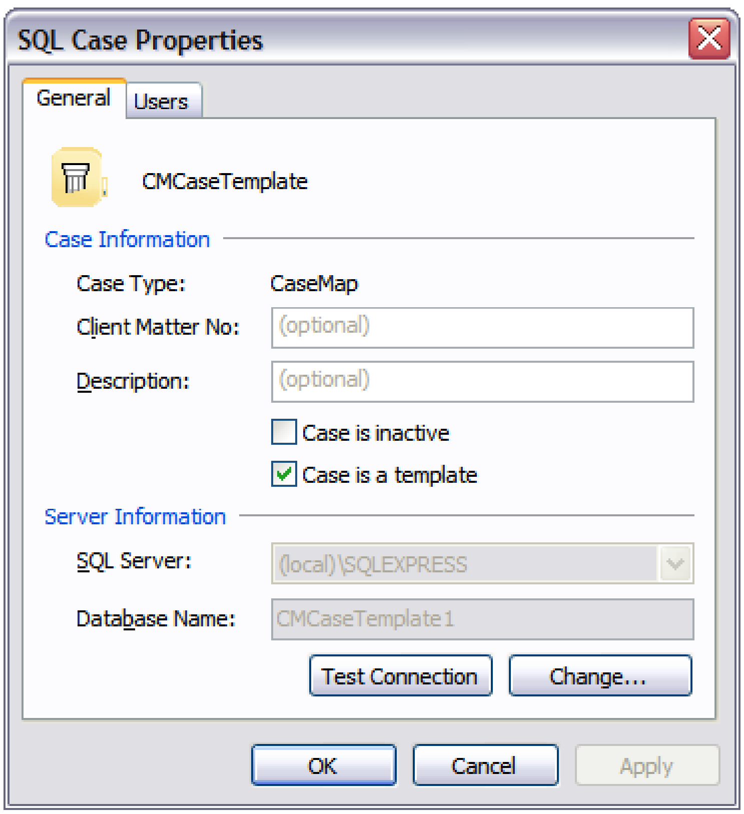
    The case now displays in the SQL Cases pane.

16. Click **Close** when you are finished.

To mark the new SQL case as a CaseMap template

1. In the **CaseMap Server** pane, click **SQL Cases**.

2. Right-click on the new SQL case template you created and click **SQL Case Properties**.



3. In the **Case Information** area, select the **Case is a template** check box.

4. Click the **Test Connection** button.

5. In the message box, click **OK**.

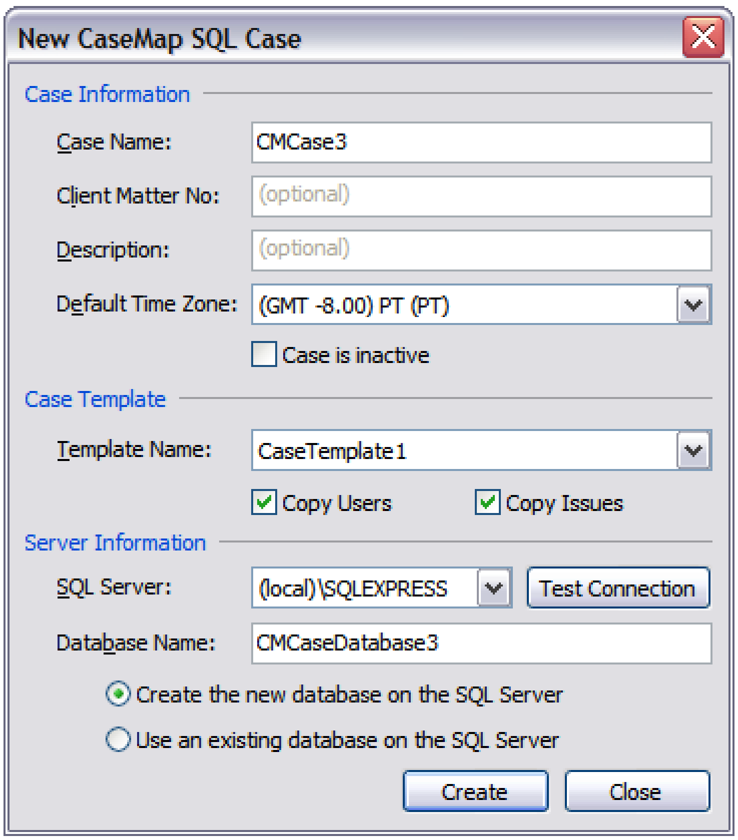
6. Click **Apply**, then click **OK** to save the setting.

   The case template now displays in the SQL Cases list with a blue icon to identify it as a template.

   The new case template name also displays in the Template Name drop-down listing when new SQL cases are created.

To create a new SQL case from a SQL template

1. Follow Steps 1-9 to create a new SQL case.



2. In the **Template Name** drop-down listing, select the template you want to use for the new SQL case.

   If you choose the CaseMap Default Template option, you will create a new SQL case based on an empty case template (no users or case issues).

3. Select the **Copy Users** check box to include the template's case staff in the new SQL case.

4. Select the **Copy Issues** check box to include the template's case issues in the new SQL case.

   You cannot copy any other spreadsheet detail into the new SQL case: users and issues only.

5. Complete Steps 11-18 to create the new SQL case from the selected template.

   When the new SQL case is opened in CaseMap, the users and case issues included in the template display in the new case.

Related Topics

Configuring SQL Server for CaseMap templates

Managing SQL case files

Replicating/Synchronizing Cases

Creating replica SQL cases

Replicas of SQL cases can be created in the CaseMap Admin Console and in the CaseMap and TextMap client applications. Replicas of local cases can only be created in CaseMap or TextMap.

The replication process in the CaseMap Admin Console is nearly identical to the replication process in the CaseMap and TextMap client applications. At least one user must be assigned to a SQL case in the CaseMap Admin Console before a replica can be created. All users assigned to a SQL case will be exported when the replica case is created. Like local case replicas, you also have the option to password protect SQL case replicas.

Synchronization of cases is done only in CaseMap and TextMap. CaseMap replicas can only be synchronized with the master case once. TextMap cases can be synchronized with the master case repeatedly, as needed. If you have multiple remote users that need to work in a replica, create a separate replica for each user. Users can be granted permission in the CaseMap Admin Console to create replicas for both local and SQL cases.

All case replica names (local and SQL versions) must be unique. Creating a replica copy of a CaseMap or TextMap case database is an exclusive process. Case staff cannot access the master case during this process.

For more information, see About replicating/synchronizing cases.

For more information on how to replicate and synchronize local and SQL cases in the CaseMap client, see the following topics:
About replicating/synchronizing cases
Creating replica cases
Synchronizing cases
Synchronizing linked documents from a replica
Converting replicas to master cases
Reviewing synchronization history

For more information on how to replicate and synchronize local and SQL cases in the TextMap client, see the following topics:
About replicating/synchronizing cases

[Creating replica cases](#)
[Synchronizing cases](#)
[Taking video transcripts offline](#)

To create replica SQL cases

1. In the **CaseMap Server** pane, click on **SQL Cases**.
2. Click on the case for which you want to create a replica.
3. On the **Action** menu, click **Export to Access**, and then click **Create Replica**.

   Or right-click on the case, click Export to Access, and then click Create Replica.
4. In the **Select a location for the case replica** dialog box, locate the directory where you want to save the case replica, then click **Save**.
5. In the message box, click **Yes** or **No** to set a password for the case replica.

   If you click Yes, type in a password and confirm it in the Case Password dialog box, then click OK.

   This is a global password that applies to all case users accessing the replica.
6. In the **Replica Comments** dialog box, type in any case comments or a description, then click **OK**.

   A status box shows the export progress of converting the SQL case to an Access case.
7. In the message box to confirm the case export, click **OK**.

   Notice that the file location displays in the message box.

   The case replica can now be accessed by users in CaseMap.

Related Topics

Synchronizing SQL cases
Creating snapshots

Synchronizing SQL cases

Synchronizing SQL case replicas with the master case is done in the CaseMap and TextMap client applications. CaseMap replicas can be synchronized with the master case only once. TextMap cases can be synchronized with the master case repeatedly, as needed.

To replicate and synchronize cases in CaseMap

For more information on how to replicate and synchronize local and SQL cases in the CaseMap client, see the following topics:

About replicating/synchronizing cases
Creating replica cases
Synchronizing cases
Synchronizing linked documents from a replica
Converting replicas to master cases
Reviewing synchronization history

To replicate and synchronize cases in TextMap

For more information on how to replicate and synchronize local and SQL cases in the TextMap client, see the following topics:

About replicating/synchronizing cases
Creating replica cases
Synchronizing cases
Taking video transcripts offline

Related Topics

Creating replica SQL cases

Creating snapshots

Creating snapshots

Snapshots are a point-in-time picture of a CaseMap case that preserves current data. Use snapshots for case staff who need to view and filter case data and generate reports. Snapshots cannot be used to edit data in a CaseMap case. Snapshots cannot be synchronized with the master case. Any edits case staff make in their snapshot copy of the case must be manually entered in the master case. Snapshot file names must be unique.

Saved snapshots can be restored to see what the contents of a case were at a particular time.

To create a snapshot

1. In the **CaseMap Server** pane, click on **SQL Cases**.

2. Click on the CaseMap SQL case for which you want to create a snapshot.

3. On the **Action** menu, click **Export to Access**, and then click **Create Snapshot**.

   Or right-click on the case, click Export to Access, and then click Create Snapshot.

4. In the **Select a location for the exported case** dialog box, select the directory folder, then click **Save**.

5. In the message box, click **Yes** or **No** to set a password for the snapshot.

   If you click Yes, type in a password and confirm it in the Case Password dialog box, then click OK.

   This is a global password that applies to all case users accessing the snapshot.

6. In the message box to confirm the case export, click **OK**.

   Notice that the file location displays in the message box.

Related Topics

Creating replica cases in the Admin Console

Replicating/Synchronizing in CaseMap

About replicating/synchronizing

Replication and synchronization is a CaseMap feature that permits case staff to work in different local copies of a master case (local or SQL) that can be merged to create one updated version of the master case. You can create replicas of local and SQL cases in CaseMap.

Replication vs. Synchronization:

- Replication is creating an exact copy of a case while tracking the replicated file
- Synchronization is merging the replica to the master case, reconciling any updates or edits

When case users go on the road, they can take a replica copy along and make additions and updates to the case records. While these individuals work in replicas, case staff back in the office can still make changes to the master case. When a replica is returned to the office, it needs to be synchronized with the master case, melding changes made in the replica with those made in the master. CaseMap helps you reconcile any field update conflicts between the two cases.

Create replica cases for staff who need to work from home or access a case during court or offsite depositions.

For more information on how to create a SQL case replica in the CaseMap Admin Console, see the following topic:
Creating replica SQL cases

Learn more about the replication/synchronization process

Replication and synchronization involves:

- Creating a replica of the case
- Working in the replica while others work in the master case or other replicas
- Synchronizing the replica with the master case
- Resolving any conflicts that occur between the replica and master case

A CaseMap wizard helps you resolve conflicts between data updates in the replica and master cases. The wizard presents you with the data conflict and makes it easy to select which update to keep. During the synchronization process, you may also choose to postpone conflict resolutions to a later time when you perhaps have input as to which change should override an entry. You can make as many replicas of a case as needed and synchronize each file in any order. Replicas can only be synchronized with the master case once, and must be done one at a time.

Example of a data conflict

A data conflict occurs when contradictory changes are made in the master version and in the replica. For example, one person working the master case edits the date of a fact, making it 3/1/99. Another person working in a replica edits the data of the same fact, making it 3/2/99. When the replica and master are synchronized, CaseMap recognizes that there is a conflict between these two data changes.

CaseMap analyzes conflicts at the field level within each record. In other words, if someone changes the date of the fact in the master case and another user changes the Evaluation field status for that same fact, no conflict occurs. Likewise, if someone changes the date of the fact in the master case and another user changes the date of the fact in the replica to the same date, no conflict occurs.

Follow these guidelines to ensure synchronization success

Reference the following table for guidelines and considerations when replicating and synchronizing cases.

Replication and Synchronization Guidelines and Considerations
Replica copies are made per individual users; users cannot share a copy.
You can make as many replica copies of the master case as needed. You can track replicas in the Synchronization History dialog box accessible from the File menu.
Replica copies can only be synchronized with the master case once. Any edits made in the replica after that need to be manually added to the master case.
Always merge replica copies with the master case when they are returned, regardless if a user says updates were not made to the file. Any updates/conflicts are tracked in the Synchronization utility's Synch History box.
You can synchronize replicas in any order you want. They do not have to be synchronized in the order they were created.
When replicas are distributed, users working the master case are not allowed to delete case issues until all replicas are synchronized with the master.

Replication and Synchronization Guidelines and Considerations
When working in a replica, users cannot create new fields or add new users to the replica case. These tasks can only be performed in the master case.
Saved views and searches in a replica are lost when you synchronize cases. Keep track of any data that needs to be recreated in the master case.
Exported copies of the case cannot be synchronized with a master case. Only copies made during a replication process can be synchronized.
Convert replicas to create a new master case when a case file corrupts, information is lost on the network, or backups are lost/corrupt.

Reference specific synchronization rules

Reference the following table for specific rules for users of both the replica and master case files, while a replica copy is checked out. The term "pre-existing" has the following meanings for the replica and master columns in the table below.

- **Master** — Pre-existing: A record or value that exists in one or more replicas that have not been synchronized.
- **Replica** — Pre-existing: A record or value that exists in the master copy of a case.

Synchronization Rules

Area	Master Case	Replica Case
Facts spreadsheet	No Restrictions (NR)	No Restrictions (NR)
Objects spreadsheets	Cannot change the Object Type field for a pre-existing object. Cannot delete a pre-existing object.	Cannot change the Object Type field for a pre-existing object. Cannot delete a pre-existing object.
Issue spreadsheet	Cannot delete a pre-existing issue.	Cannot delete a pre-existing issue.
Question spreadsheet	NR	NR
Authority spreadsheet	NR	NR
Authorities and Extracts spreadsheet	NR	NR
Staff Dialog	Cannot delete a pre-existing staff member.	Cannot add, edit, or delete a staff member.

Synchronization Rules		
Area	**Master Case**	**Replica Case**
Field Properties	Cannot delete a pre-existing field. Cannot delete a pre-existing value of a fixed or open-ended list.	Cannot add, rename, or delete fields. Cannot delete a pre-existing value of a fixed or open-ended list.
File Viewers	Cannot delete a pre-existing viewer.	Cannot delete a pre-existing viewer. Changes to pre-existing viewers are not synchronized.
Spreadsheet Views	NR	Changes are not synchronized.
Case Properties	NR	Changes are not synchronized.
Saved Searches	NR	Changes are not synchronized.
Related Files	NR	Changes are not synchronized.

Related Topics

Creating replica cases
Synchronizing cases
Synchronizing linked documents from a replica
Converting replicas to master cases
Reviewing synchronization history

Creating replica cases

The Create Replica Wizard guides you through the process of creating a replica so a user can take a case copy and work offline. Changes made in the replica can be synchronized with the master case when the user is finished working in it.

All case replica names (local and SQL versions) must be unique. Creating a replica copy of a CaseMap case is an exclusive process. Case staff cannot access the master case during this process.

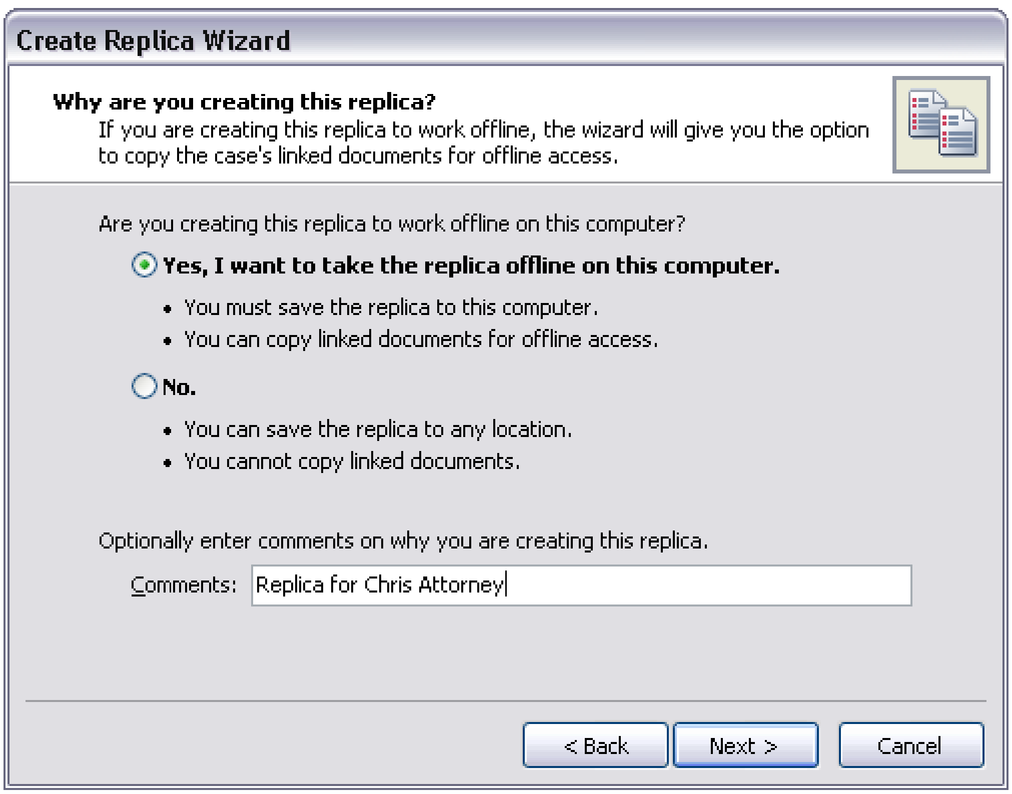
If the master case has document files linked to other applications (like Concordance or TextMap, etc.), they cannot be copied into the replica and a message box indicates the number of files excluded in the replica.

If you are working with SQL cases, the replication process is nearly identical to creating a replica of a local case. Synchronization of all replicas with the master case file is done in the CaseMap client application.

For more information on how to create a SQL case replica in the CaseMap Admin Console, see the following topic:
Creating replica SQL cases

To create a case replica

1. In **CaseMap**, open the case for which you want to make a replica.
2. On the **File** menu, click **Synchronize**, and then click **Case Replica**.
3. When the **Create Replica Wizard** launches, click **Next**.
4. In the **Why are you creating this replica?** dialog box, choose where you want to save the replica.

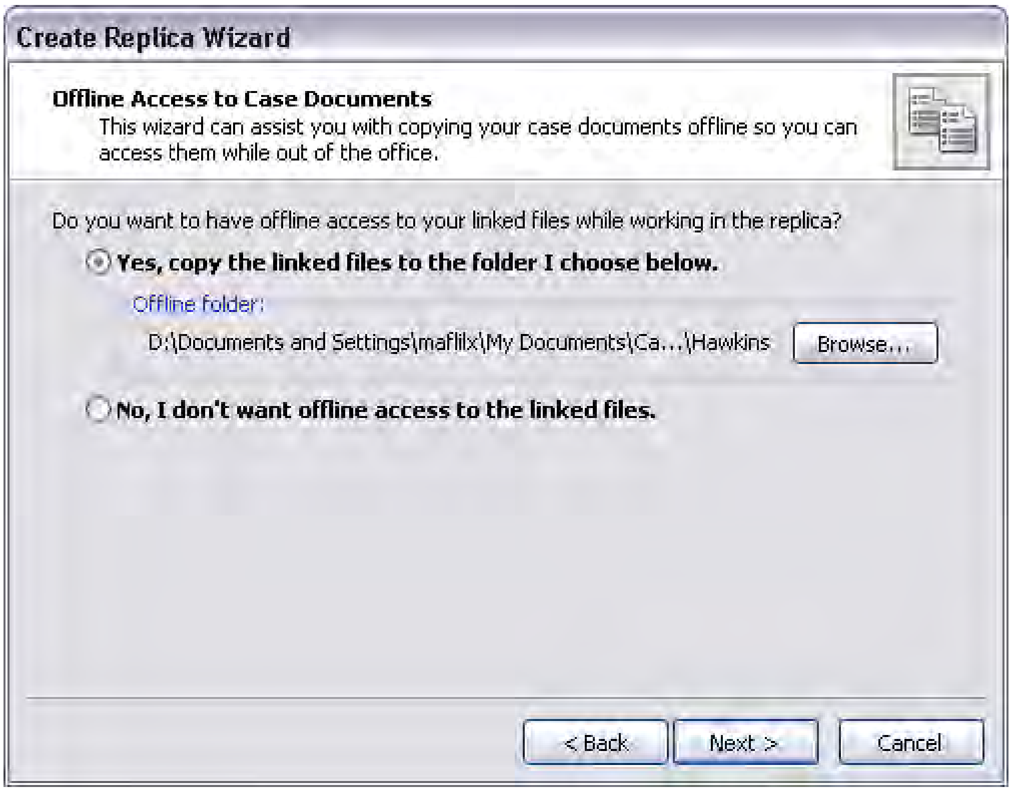


- Click Yes to save a replica to the computer you are using so that document links are retained.

- Click No to save the replica to any network directory folder or USB drive. Linked documents will not be copied.

5. In the **Comments** field, type in a description for the replica for tracking purposes, then click **Next**.

6. In the **Offline Access to Case Documents** dialog box, choose whether you want access to linked documents while working in the replica.



- Click Yes and then click Browse to navigate to the folder destination where you want to store the linked files.
- Click No if you don't want to access the linked documents.

If you have files linked to other applications (like Concordance or TextMap, etc.), they cannot be copied into the replica and you will be notified of the number of files excluded.

7. In the **Offline Document Access Overview** dialog box, review the number of linked documents that were copied to the desktop and note how many may not have been copied if linked to other applications.

8. Select the **Show me detailed information on the linked files when I click Next** check box in order to view the information.

9. In the **Linked Files Not Supported** dialog box, review the excluded files listed, then click **Next**.

10. In the **Linked Files to Copy** dialog box, review the destination folder location for the files that will be copied, then click **Next**.

11. In the **Name and Location** dialog box, type in a name for the replica.

12. Click **Browse** to select the destination folder for the replica, then click **Next**.

13. Click **Finish** when the process completes and to open the master case.

    In the location where you stored the replica, you should now see the replica.

14. In the **Case Log On [Master]** dialog box, click **OK**.

    Note that the master case displays [Master] in the case name.

    The replica case is now ready for use. When the replica is opened, it will display [Replica] in the case name.

Related Topics

About replicating/synchronizing cases
Synchronizing cases
Synchronizing linked documents from a replica
Converting replicas to master cases
Reviewing synchronization history

Synchronizing cases

Synchronizing a replica with a master case allows you to review any data updates made by users working in the master case that may conflict with data updates made by the user in the replica. You can choose whether to accept the update from either case, or you can defer the decision until you have verified with case staff which update is correct.

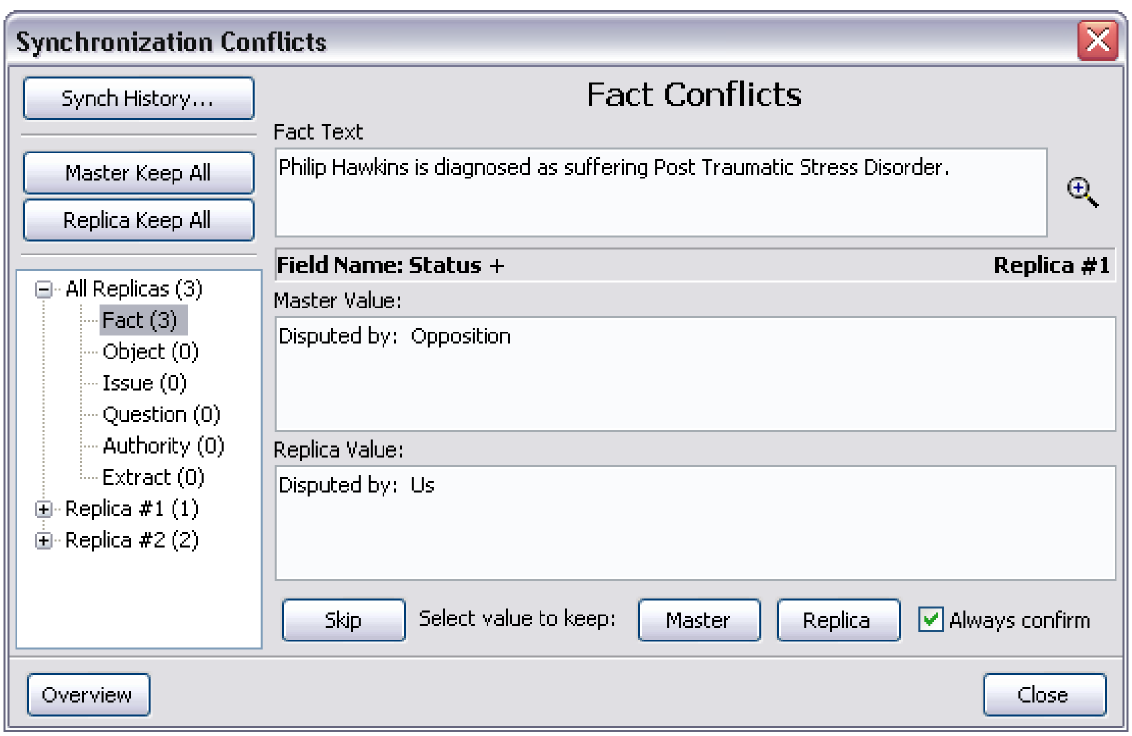
When all data conflicts are resolved, be certain to delete the case and archive it so a user does not access it again. Replicas can only be merged with the master case once. Any updates made in a replica after it is synchronized must then be manually entered in the master case.

If you are working with SQL cases, the synchronization process is the same as if you are synchronizing a replica of a local case. Synchronization of all replicas (local and SQL) with the master case is done in the CaseMap client application.

For more information on how to create a SQL case replica in the CaseMap Admin Console, see the following topic:
Creating replica SQL cases

To synchronize a replica with the master case

1. In **CaseMap**, open the master case for which you want to synchronize a replica.
2. On the **File** menu, click **Synchronize**, and then click **Synchronize Master**.
3. In the message box to open the case exclusively, click **Yes**, and then click **OK**.
4. In the **Select a replica to synchronize with** dialog box, select the replica you want to merge with the master case, and then click **Open**.
5. In the message box, click **Yes** to confirm the message to begin the synchronization process.
6. When the synchronization process is finished, CaseMap displays a message box asking if you want to delete the replica.
   - Click Yes to delete the replica and ensure that the user will not continue to access the case and make updates.
   - Click No if you want to preserve a copy of the replica.
7. In CaseMap, review the fact records updated in the replica to see them now accepted in the master case.
8. If conflicts occur, CaseMap displays a message box allowing you to decide whether to resolve conflicts immediately or postpone it until later.
   - Click Yes to resolve the conflicts now.
   - Click No to resolve the conflicts at a later time.
9. In the **Synchronization Conflicts** dialog box, click on a spreadsheet with a number next to it, indicating there is a data conflict.

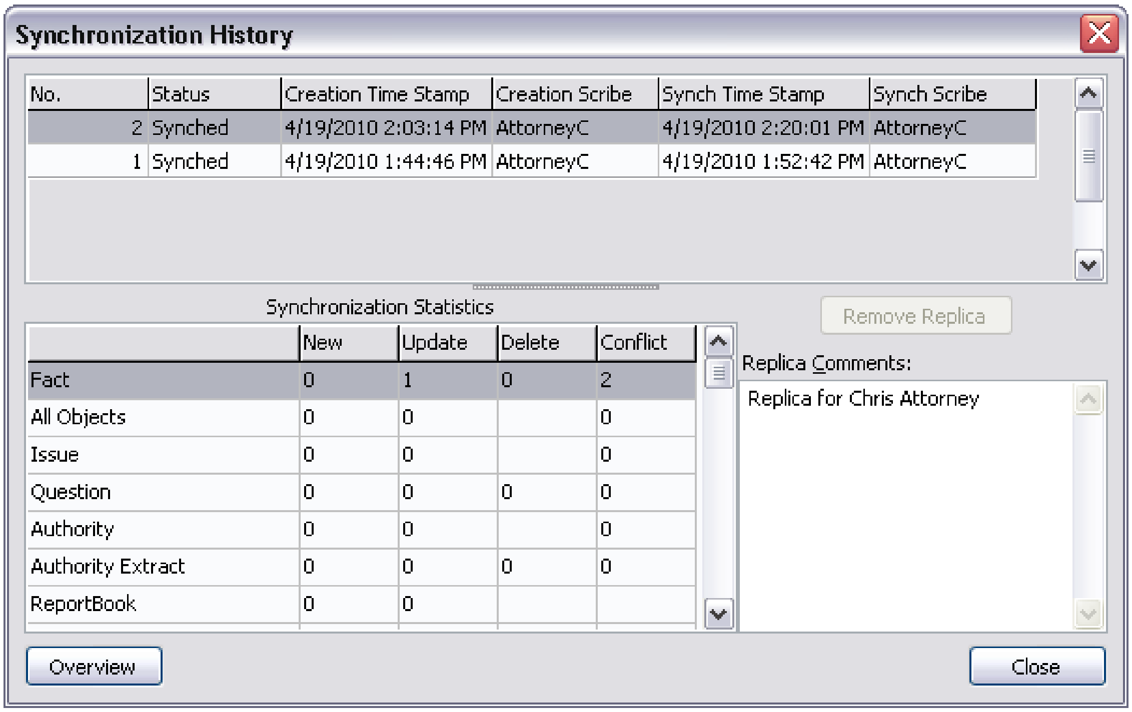


10. In the **Synchronization Conflicts** dialog box, review the two fields that conflict.

Notice that the data content that conflicts displays in a field at the top of the dialog box.

11. Click the **Synch History** button to review the merged data statistics.

12. In the **Synchronization History** dialog box, review the users who made the updates and what date and time this occurred.



You can also review the statistics for each spreadsheet and how many records were created, updated, deleted, or contain conflicts.

13. Click **Close** to continue with the conflict resolution.

14. In the **Synchronization Conflicts** dialog box, select the **Always Confirm** check box as a safety measure for tracking the update.

15. Next choose which value to keep:

- Click the Replica button to accept the update from the replica.
- Click the Master button to accept the update from the master case.
- Click Skip if you are uncertain which value should be retained and want to verify the update with team members for the correct resolution.

You may also choose to accept all updates from either of the files by clicking Master Keep All or Replica Keep all buttons.

16. In the message box to confirm, click **Yes**.

17. Continue to resolve data conflicts between the replica and master following Steps 14-16 until completed.

18. Click **Close** when all conflicts are resolved and to finalize the synchronization process.

Data conflicts with the master case are now resolved.

If you selected to delete the replica, it is now eliminated to reduce confusion. If the replica still exists, be certain that users know not to access it again and store it in an archived location on your network.

To resolve skipped conflicts in a replica case

1. Open the master case where conflicts with a replica occurred.
2. On the **File** menu, click **Synchronization**, and then click **Resolve Conflicts**.
3. In the **Synchronization Conflicts** dialog box, click on the spreadsheet where the data conflicts occurred.
4. Review the conflicts that were skipped, then choose which value to keep:
   - Click the Replica button to accept the update from the replica.
   - Click the Master button to accept the update from the master case.
   - Click Skip if you are uncertain which value should be retained and want to verify the update with team members for the correct resolution.
   - Click the Detail button if you want to merge values of the master and replica together in the case.

   You may also choose to accept all updates from either of the files by clicking Master Keep All or Replica Keep all buttons.
5. In the message box to confirm, click **Yes**.
6. Continue to resolve data conflicts between the replica and master following Steps 4-5 until completed.
7. Click **Close** when all conflicts are resolved and to finalize the synchronization process.

   Data conflicts with the master case are now resolved.

Related Topics

About replicating/synchronizing cases
Creating replica cases
Synchronizing linked documents from a replica
Converting replicas to master cases
Reviewing synchronization history

Synchronizing linked documents from replicas

If a staff member has linked new document files in a replica on his or her desktop, you can still merge the two files and retain the links — if you have a copy of the source files stored in a folder the user's computer when the synchronization process occurs.

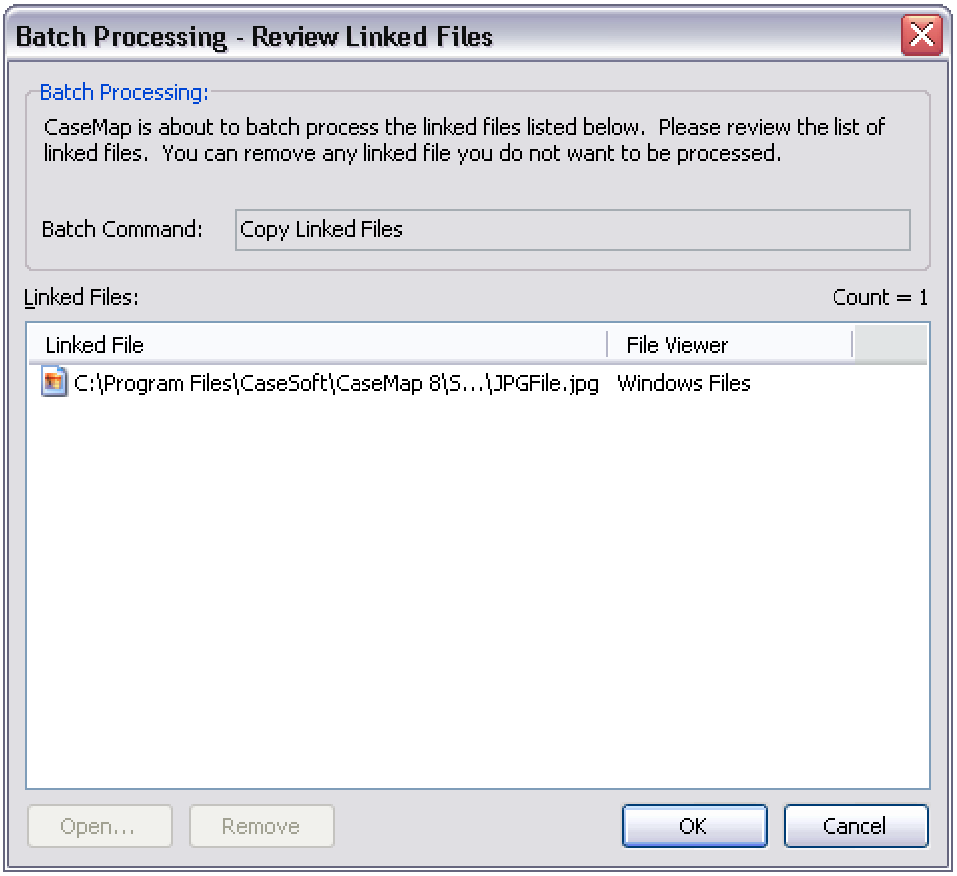
Before synchronizing the linked documents, you need to copy the folder of the source files to the network directory folder that stores these case documents — which also then requires re-mapping the source file location. Moving and re-mapping the linked documents ensures that other staff members can access these source files from the network.

⚠ We recommend you make a backup copy of the case before making any global changes, like re-mapping linked documents. Once the process is complete, you cannot undo the changes without restoring a backup copy of the case.

To synchronize new linked documents from a replica

1. First synchronize the replica with the master case.
2. Identify the new linked documents that were added to the folder of documents on the computer where the replica resides.

   An easy way to do that is to run an instant search in the Linked File field on the drive letter on the computer where the new documents were added.
3. Right-click on the drive letter and then click **Filter by Selection**.
4. On the **Tools** menu, click **Linked Files**.
5. On the pop-up menu, click **Batch Processing**, and then click **Copy Linked Files**.
6. In the **Batch Processing - Review Linked Files** dialog box, review the linked files you are about to copy, then click **OK**.



7. In the **Browse for Folder** dialog box, navigate to the directory folder destination where other cases are stored and where you want to copy the files, then click **OK**.

8. In the message box to confirm the linked files to copy, click **Yes**.

9. In the message box to confirm that copies were made, click **Yes**.

10. In the **Case Shortcuts** pane, click the icon for the object or research spreadsheet that is applicable to documents being copied.

    You must be on the All Objects, Research - Authorities, or Research - Extracts spreadsheet when running the Change Linked File Paths utility.

11. On the **Tools** menu, click **Linked Files**, and then click **Change Linked File Paths**.

12. In the message box to change the linked file paths, click **OK**.

13. In the **Select Path** dialog box, select the file path used when a copy of the files was taken offline, then click **OK**.

14. In the message box, click **OK** to browse to the new location for the linked files.

15. In the **Browse for Folder** dialog box, navigate to the directory location you want for the linked files, then click **OK**.

16. In the message box, verify your old and new path selections, then click **Yes**.

17. In the message box to confirm the file path change, click **OK**.

    The documents added in the replica are now added to the master case. The linked documents are now copied to the directory location where other case documents are stored and where all users can access them.

Related Topics

- About replicating/synchronizing cases
- Creating replica cases
- Synchronizing cases
- Converting replicas to master cases
- Reviewing synchronization history

Converting replicas to master cases

If a master case is accidentally deleted and cannot be recovered properly, you can convert a replica to make a master case. Once you convert a replica to a master case, you cannot synchronize it with the original master case.

For more information on how to create replica SQL case files in the CaseMap Admin Console, see the following topics:
Creating replica SQL cases
Synchronizing to SQL cases

To convert a replica to a master case

1. In **CaseMap**, open the replica you want to convert to a master case.
2. In the message box, click **OK** to continue.
3. On the **File** menu, click **Synchronize**, and then click **Convert Replica to Master**.
4. In the message box to open the case exclusively, click **Yes**, and then click **OK**.
5. In the message box to confirm the conversion, click **Yes**.
6. In the message box to confirm the process completion, click **OK**.

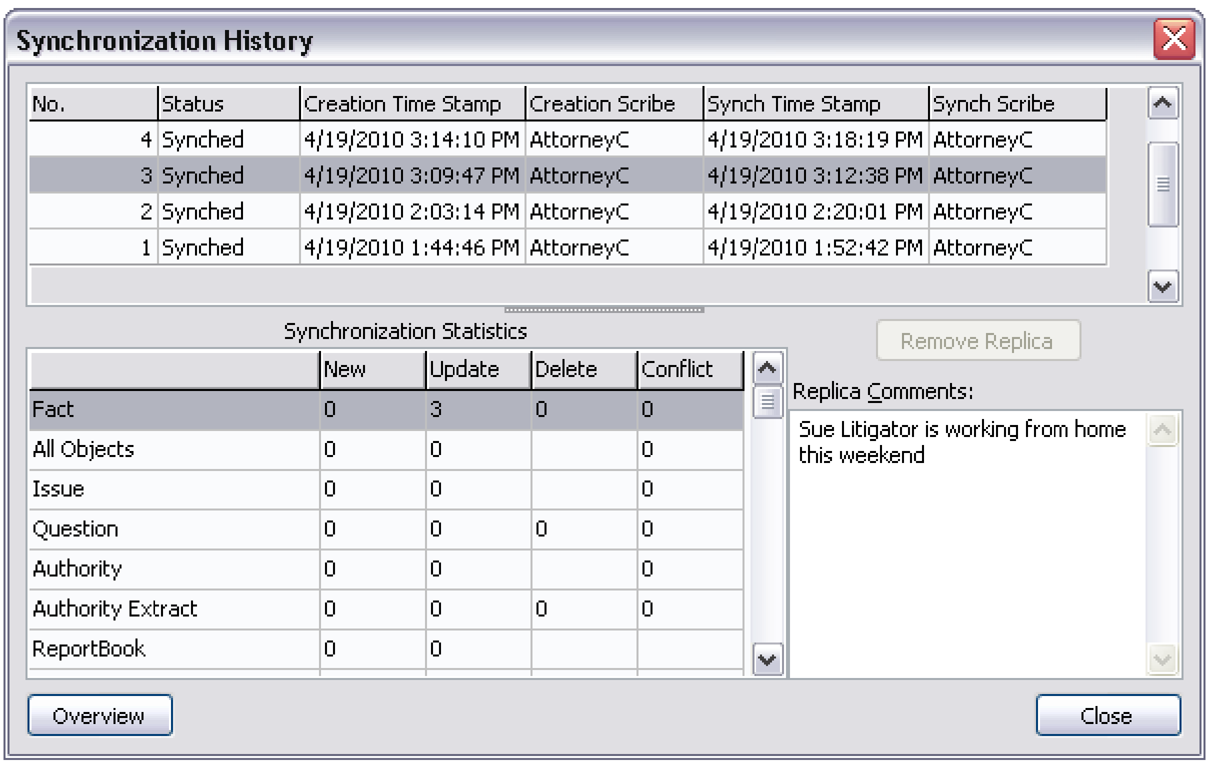
   The replica is now considered a master case by CaseMap and can be used as such.

Related Topics

[About replicating/synchronizing case files]
[Creating replica case files]
[Synchronizing case files]
[Synchronizing linked documents from a replica]
[Converting replicas to master case files]

Reviewing synchronization history

CaseMap tracks the synchronization history of replicas and the master cases. You can get an instant overview of the number of replicas created for each case, who created them, and when they were synchronized with the master. CaseMap also tracks data statistics for case, noting each spreadsheet in which an update or conflict occurred. Any replica comments used for tracking purposes also display.



To review synchronization history

1. On the **File** menu, click **Synchronize**, and then click **History**.

   The Synchronization History dialog box displays the number of replicas created for the master case and statistics for each.

2. To delete a replica from the history listing, select it and click the **Remove Replica** button.

3. Click **Close** when you are finished.

Related Topics

[About replicating/synchronizing cases]
[Creating replica cases]
[Synchronizing cases]
[Synchronizing linked documents from a replica]
[Converting replicas to master cases]

Replicating/Synchronizing in TextMap

About replicating/synchronizing

Replication and synchronization are TextMap feature that permit case staff to work in replica copies of a master case (local or SQL) that can be merged to create one updated version of the master case. You can create replicas of local and SQL cases in TextMap.

Replication vs. Synchronization:

- Replication is creating an exact copy of a case for a user to work in away from the office
- Synchronization is merging the replica to the master case (adding new transcripts, annotations, and coded issues)

When case users go on the road, they can take a replica along and make additions and updates to case records. While these individuals work in replicas, case staff back in the office can still make changes to the master case. When the replica is returned or emailed to the office, TextMap synchronizes the latest content to the master case.

With TextMap, a replica can be synchronized repeatedly with the master case — without creating duplicate transcripts and annotations. This allows users on the road to email replicas back to the main office for synchronization each time significant updates are made, while continuing to work in the replica.

All replica name (local and SQL versions) must be unique. Creating a replica of a TextMap case is an exclusive process. Case staff cannot access the master case during this process.

A replica cannot be created if users are actively working in the case (synchronizing cases, or importing, updating, and deleting transcripts). Please notify case users to exit the case before creating a replica of a case. Password protection of replica is optional, however at least one user must be assigned to the case before a replica can be created.

Create replicas for case staff who need to work from home or access a case during court or offsite depositions.

For more information on how to create a SQL case replica in the CaseMap Admin Console, see the following topic:
[Creating replica SQL cases]

Follow these guidelines to ensure synchronization success

Reference the following table for guidelines and considerations when replicating and synchronizing case files.

Replication and Synchronization Guidelines and Considerations
Replica copies can be saved to a network folder and shared among users.
At least one user must be added to a case before a replica can be created; passwords are optional.
Case staff in the master case are exported to the replica for both local and SQL cases. * If you add additional staff to a replica, they are not added to to the master case when synchronization occurs. For a local case, add new users by clicking Tools > Case Staff. For a SQL case, new users are added in the CaseMap Admin Console and need to then be assigned to a role and the SQL case.
A replica cannot be created if users are actively working in the case (synchronizing case files, or importing, updating, and deleting transcripts).
You can make as many replica of the master case as needed.
Replicas can be synchronized with the master case repeatedly; allowing users to continue working in the replica while emailing updated copies back to the office for synchronization.
Always merge replica copies with the master case when they are returned, regardless if a user says updates were not made to the file.
Exported copies of the case cannot be synchronized with a master case. Only copies made during a replication process can be synchronized.
Convert replicas to create a new master case when a case file corrupts, information is lost on the network, or backups are lost/corrupt. * In this instance, any transcripts or additional information added in the corrupt master case that does not exist in the replica may need to be imported/added to replace lost data.
See the Synchronization Rules for Issues table in this help topic for limitations regarding issues in a TextMap replica.

Reference specific synchronization rules for issues

Reference the following table for specific synchronization rules, particularly regarding issues.

Synchronization Rules for Issues
TextMap only supports adding issues from one case to another. The synchronization feature does not change the issue outline hierarchy in the master case if you have rearranged it in the replica.
TextMap adds new issues to ensure that links are not lost. TextMap ignores the issue outline arrangement, issue colors, and renamed or deleted issues when adding issues from the replica.
After synchronization completes, case staff must combine duplicate issues or remove unwanted issues. The Delete Issue Wizard allows you to move links from one issue to another. If the issue is linked to any annotations, the Delete Issue Wizard displays.
TextMap matches issues from one case to another by issue name only. If new issues are created in the replica, they are only added as a new issue in the master case if they are linked to annotations. * Issues that are added, edited, renamed, or deleted in the replica, and are not linked to an annotation, are not updated in the master case when synchronization occurs.
TextMap does not synchronize the following issue changes: • Issue outline levels or order • Issue names • Issues deleted in the replica are not deleted in the master • Issues deleted in the master are added back when synchronizing with a replica
TextMap does copy links for new annotations to the master case.
TextMap completely replaces annotations that are edited in a recent replica. The replica copy of the annotation is synchronized into the master case if the Last Update Time Stamp in the replica is later than that of the master case's Last Update Time Stamp.

Related Topics

Creating replica cases
Synchronizing cases
Taking video transcripts offline

Creating replica case files

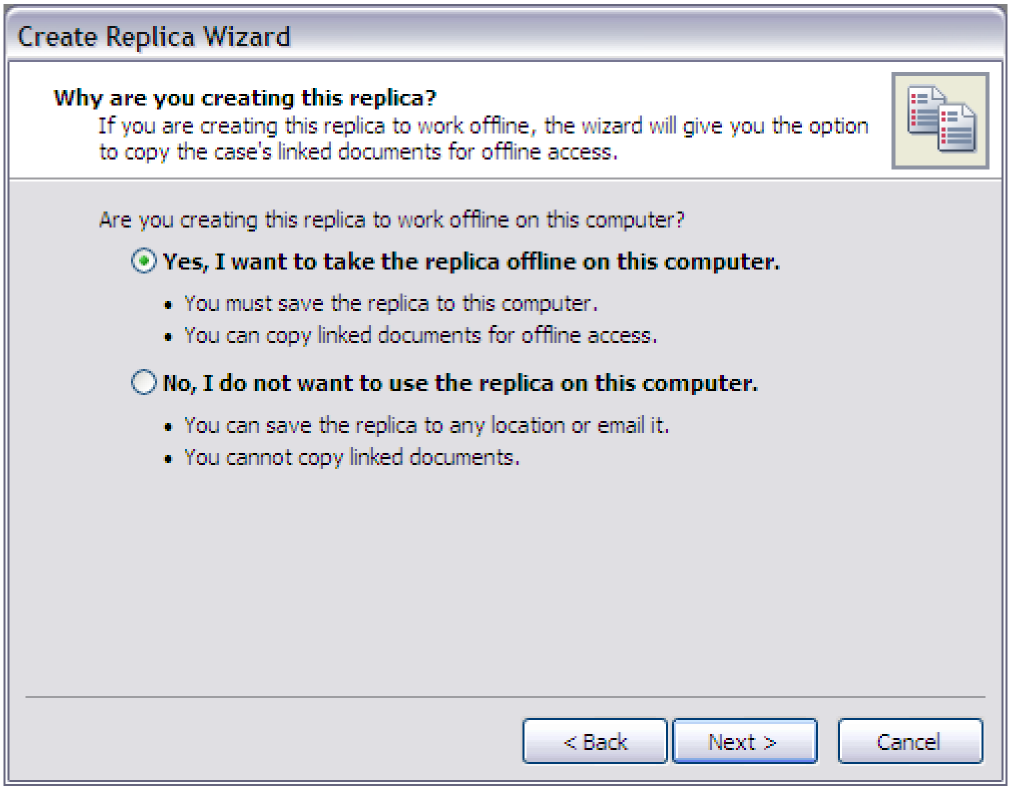
The Create Replica Wizard guides you through the steps of creating a replica copy of for local and SQL case files. The wizard offers options for how you want to save the replica. You can save a replica copy on your computer along with copies of linked documents. Or you can save the replica to a specific location on your network or email it. The last two options do include copies of linked documents.

> If you are working with SQL cases, the replication process is nearly identical to creating a replica of a local case. At least one user must be assigned to a SQL case in the CaseMap Admin Console before a replica can be created. All users assigned to a SQL case will be exported when the replica is created. For SQL cases, you also have the option to password protect the replica.
>
> Synchronization of all replicas with the master case is done in the TextMap client application. If new users are added in the replica, they must also be added in the CaseMap Admin Console as users and be assigned to the case for synchronization to be successful.

> For more information on how to create a TextMap SQL case replica in the CaseMap Admin Console, see the following topic:
> Creating replica SQL cases

To create a case replica

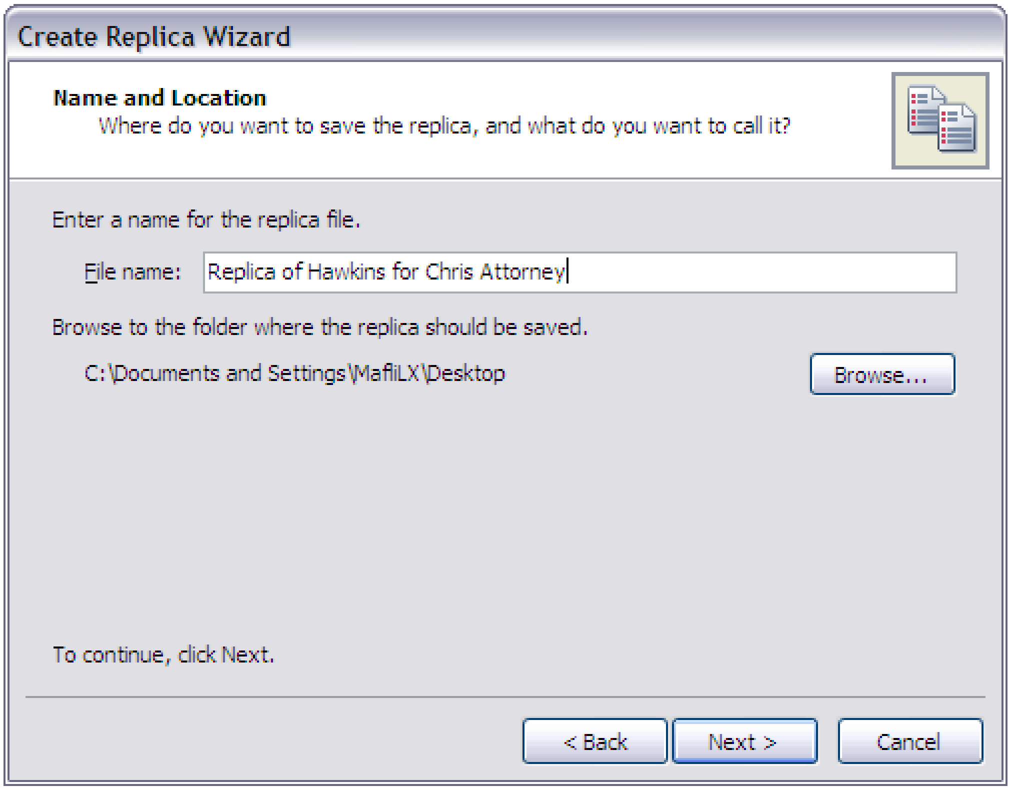
1. In **TextMap**, open the case for which you want to make a replica.
2. On the **File** menu, click **Synchronize**, and then click **Create Replica**.
3. When the **Create Replica Wizard** launches, click **Next**.
4. In the **Why are you creating this replica?** dialog box, choose where you want to save the replica.



- Select Yes, I want to take the replica offline on this computer to save the replica and copy linked documents.
- Select No, I do not want to use the replica on this computer to save the replica to another location. You cannot copy linked documents when selecting this option.

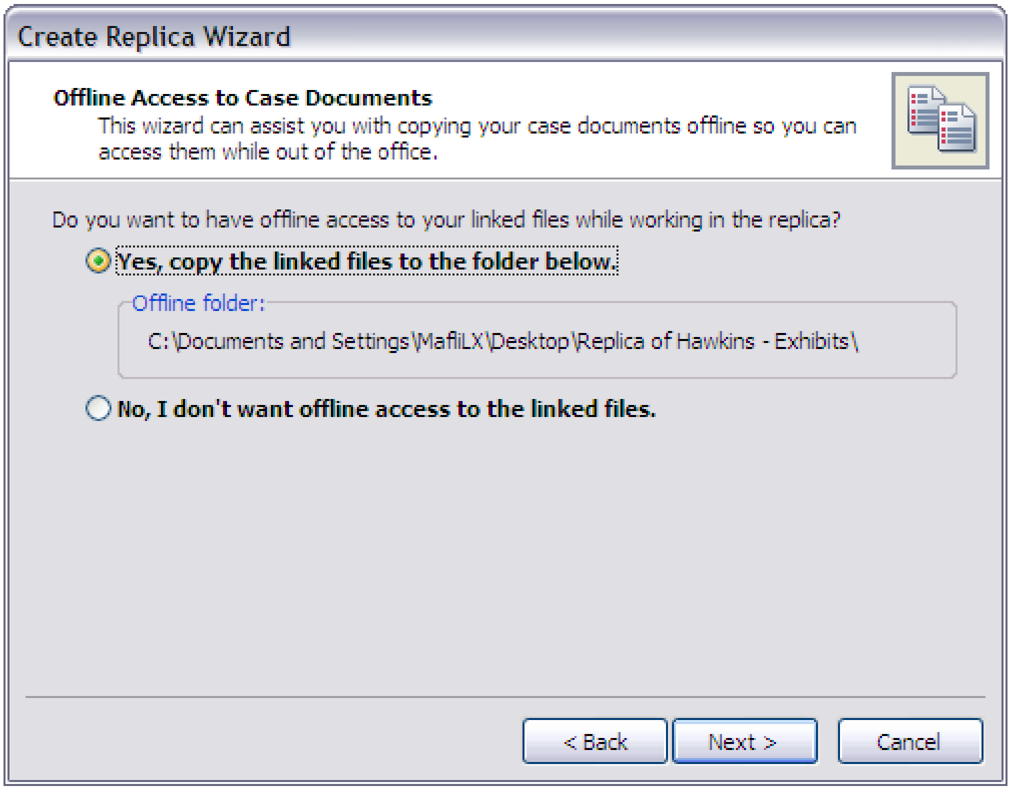
5. Click **Next** to continue.

6. In the **Name and Location** dialog box, type in a name for the replica.



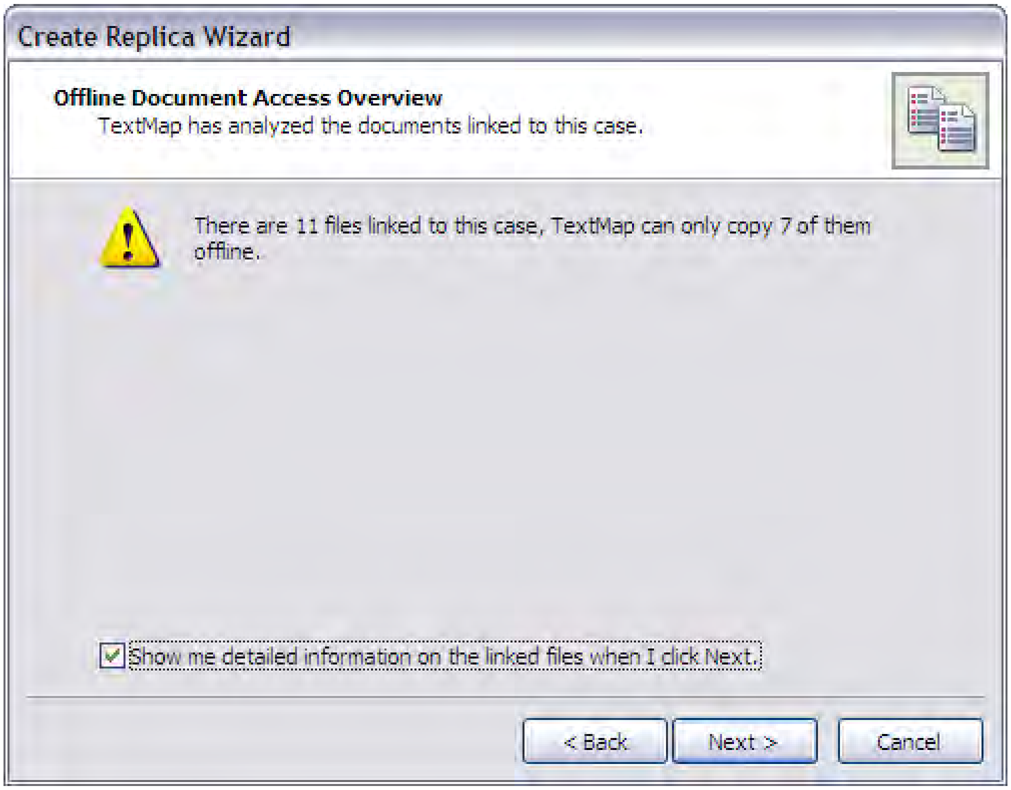
7. Click **Browse** to navigate to the folder where you want to save the replica, then click **Next**.

8. In the **Offline Access to Case Documents** dialog box, select whether you want offline access to linked documents while working in the replica.



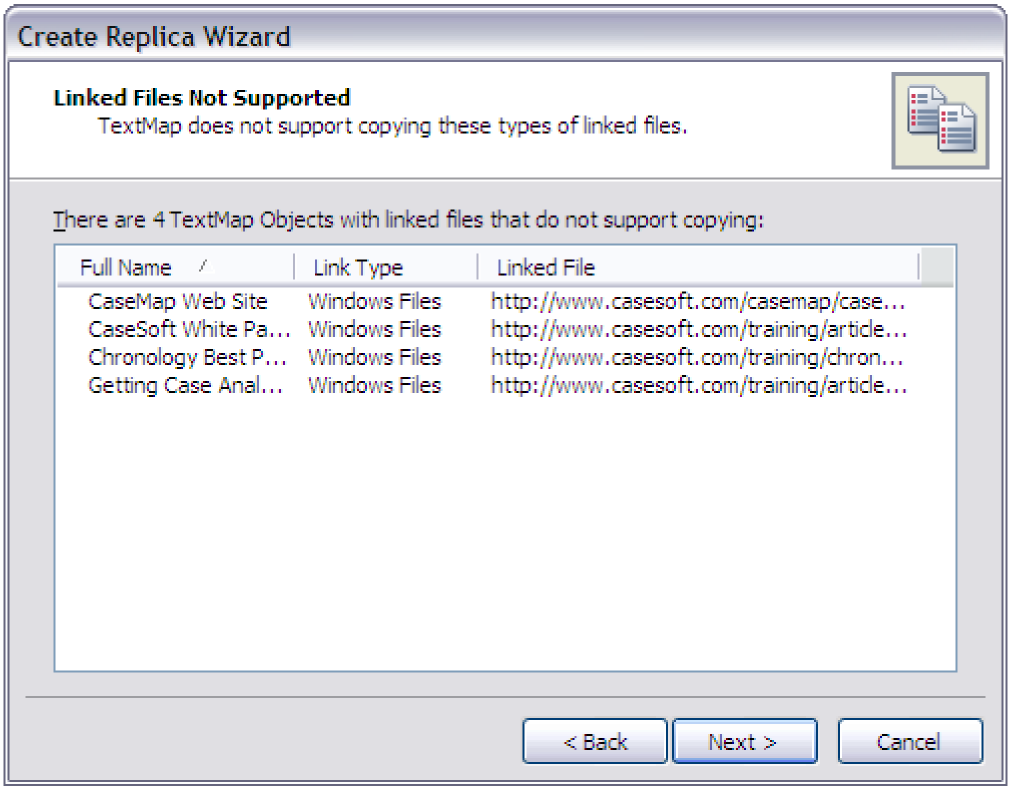
- **Select Yes, copy the linked files to the folder below to access the documents offline**

  a. Click **Next** to access the **Offline Document Access Overview** dialog box to review how many files are linked to the case, and how many TextMap can copy for you to use offline.

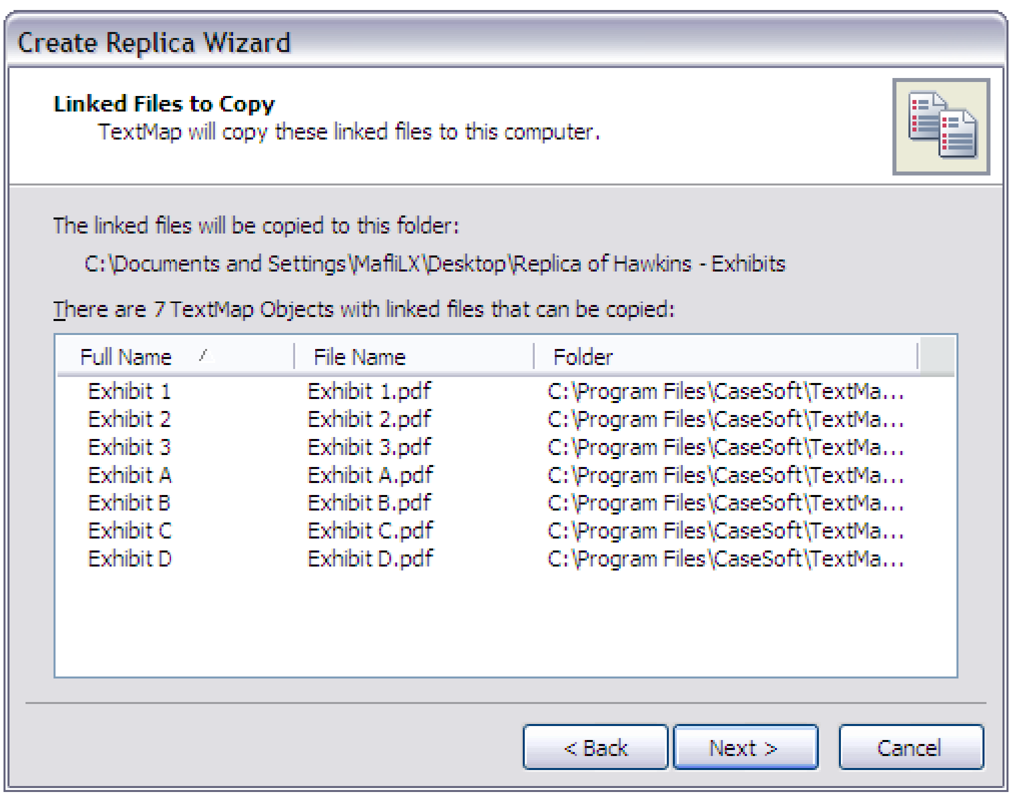


b. Select the **Show me detailed information on the linked files when I click Next** check box to view a listing of linked files that cannot be copied, then click **Next**.

c. In the **Linked Files Not Supported** dialog box, review the list of files that cannot be copied, such as linked documents that reside on Web sites. TextMap will copy Web site addresses to the replica.



d. Click **Next** to access the **Linked Files to Copy** dialog box and review a listing of all documents that can be copied.

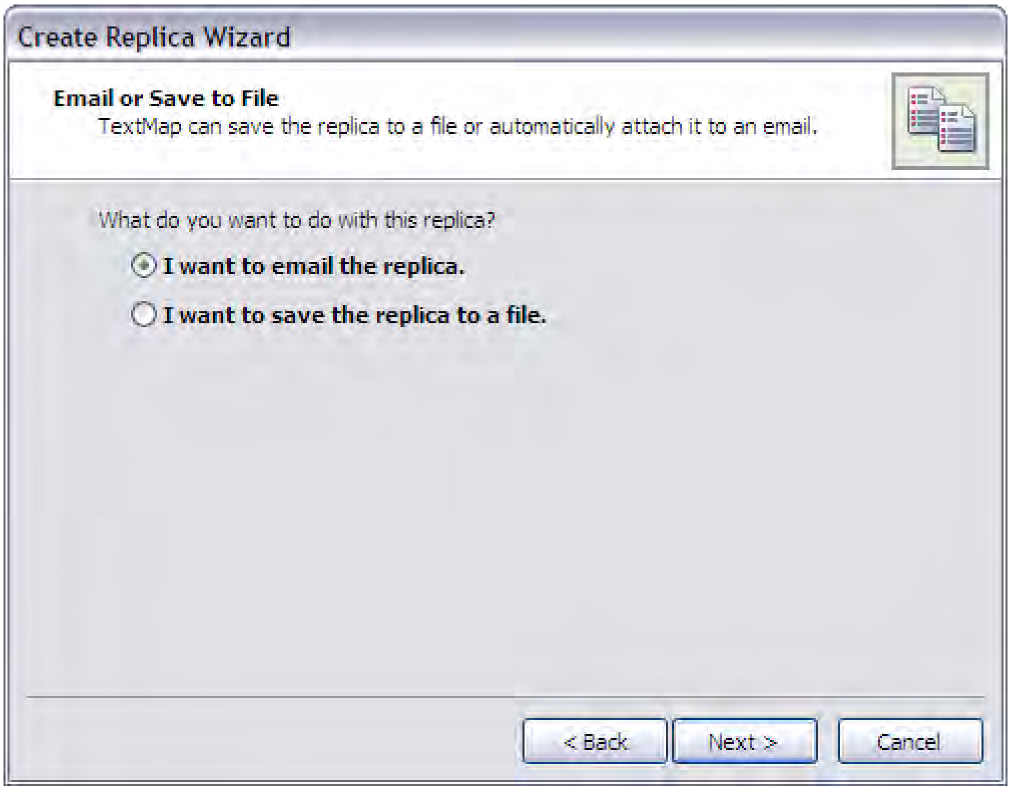


Linked files are saved in an Exhibits folder to the same location you specified to save the replica.

- **Select No, I don't want offline access to the linked files**

When this option is selected, linked documents will not be copied when the replica is created.

Click **Next** to access the **Email or Save to File** dialog box.



- **Select I want to email this replica**

1. Click **Next** to open the **Emailing the Replica** dialog box.
2. In the **File Name** field, type in the name of the replica, then click **Next**.
3. In the **Reduce Email Attachment Size** dialog box, select whether you want to create a zip file of the replica before attaching it to the email, then click **Next**.
4. Click **Finish** when the process completes.

   A Microsoft Outlook email opens with the replica case attached and information regarding the file that can be customized according to your needs.

- **Select I want to save the replica to a file**

1. Click **Next** to open the **Name and Location** dialog box.
2. In the **File Name** field, type in the name of the replica.
3. Click **Browse** to navigate to the folder where you want to save the replica.

9. Click **Next** to continue.

10. In the **Ready to Create Replica** dialog box, verify the path where the replica will be saved, then click **Next**.

11. In the **Completing the Create Replica Wizard** dialog box, click **Finish** when the process completes.

    The Case Log On dialog box displays so you can log back in to the master case.

    The replica is now saved to the location specified and is ready for use. When the the replica is opened, it will display [Replica] in the case name.

Related Topics

About replicating/synchronizing
Synchronizing cases
Taking video transcripts offline

Synchronizing case files

Synchronization in TextMap allows you to update the master case with with new transcripts, coded issues, and added annotations made in the replica. During this process, TextMap analyzes the differences between the two cases and copies changes made in the replica to the master case.

Synchronization may take a few minutes depending on the number of transcripts, annotations, and words in the transcripts to be indexed during the process. TextMap does not create duplicates of transcripts or annotations during synchronization, but updates existing transcripts with the new annotations. Refer to the About replicating/synchronizing topic for details on guidelines, considerations, and limitations for this process.

If you are working with SQL cases, the replication process is nearly identical to creating a replica of a local case. At least one user must be assigned to a SQL case in the CaseMap Admin Console before a replica can be created. All users assigned to a SQL case will be exported when the replica is created.

Synchronization of all replicas with the master case is done in TextMap. If new users are added in the replica, they must also be added in the CaseMap Admin Console as users and be assigned to the case for synchronization to be successful.

For more information on how to create a SQL case replica in the CaseMap Admin Console, see the following topics
Creating replica SQL cases

To synchronize a case

1. In **TextMap**, open the case for which you want to make a replica.

2. On the **File** menu, click **Synchronize**, and then click **Synchronize**.

3. In the message box, click **OK**.

4. In the **Select another TextMap case to synchronize with** dialog box, navigate to the case you want, then click **Open**.

5. In the message box listing, review identified transcripts and annotations to synchronize, click **Yes** to proceed.

   The master case now includes updates made from the replica.

After synchronization completes, case staff must combine duplicate issues or remove unwanted issues. The Delete Issue Wizard allows you to move links from one issue to another.

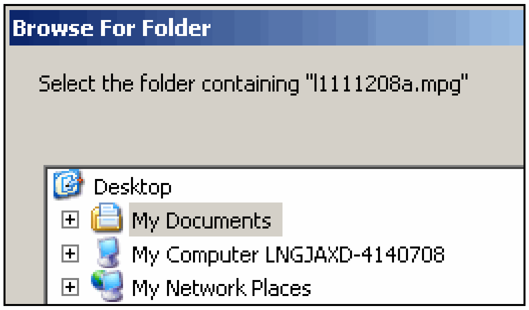
Related Topics

About replicating/synchronizing
Creating replica cases

Taking video transcripts offline

If you have imported video transcripts into your case, you can copy the files to your computer's hard drive so you can play them offline. You can copy video transcripts to your computer's hard drive by using a portable device (like a USB drive). Or you can burn a copy of the original CD to take with you and play the video files directly from the CD.

If you create a replica of the case that includes video transcripts and try to play them on your laptop, TextMap tries to locate the file in its original stored location. If it does not locate the file (especially if it is stored on your network), then a message displays in the Browse For Folder dialog box that displays the video file name.



If you have a copy of the video transcripts files stored on your laptop, then you can navigate to the folder on your hard drive to locate the file and play it. If the video transcript files are copied onto a CD, then you can navigate to the laptop's CD/DVD drive (often D: instead of E: on your office computer). Browse to and then select the folder/drive where the video is located, then click OK.

Related Topics

Creating replica cases

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