Release Notes

CaseMap® Server, Version 1.8

- **Enhancements**
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CaseMap Server Release Notes

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Version: CaseMap® Server 1.8, CaseMap® Admin Console 1.8, CaseMap® SQL Import Utility 10.1, TextMap® SQL Import Utility 1.0
Release: June 30, 2014

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CaseMap Server v1.8

Overview

Version 1.0

The CaseMap Server and CaseMap Admin Console Release Notes provide a list of new features, resolved issues, and current issues for the version 1.0+ release.

Enhancements

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1.7 Build 105 (Admin Console) - September 6, 2013

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1.8 Build 21 - June 30, 2014

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1.7 Build 52 - March 28, 2013

Enhancements

1.8 Build 19

The following enhancements have been added to CaseMap Server version 1.8, Build 19 (Build 30 for the Admin Console) released February 24, 2014:

Create TextMap 7 SQL Case

Create TextMap v7 SQL cases in the CaseMap Admin Console, in addition to creating TextMap v6 SQL cases. The SQL Cases pane displays the case type and version number for each case.

1.7 Build 105

The following enhancements have been added to CaseMap Server version 1.7 (Build 105 for the Admin Console) released September 6, 2013:

Administrators can identify CaseMap cases that have documents that require OCR

CaseMap Admin Console now offers a feature to identify CaseMap version 10 cases registered with the CaseMap Server that have linked documents that require OCR. It lists each case and how many documents and pages that require OCR.

Administrators can generate a report with statistics on the types of information in your cases

CaseMap Admin Console now offers a new report. The report analyzes the CaseMap and TextMap SQL cases registered on the CaseMap Server and displays statistics about the data in them. The report does not display any of the user-entered data.

1.7 Build 102

The following enhancements have been added to CaseMap Server version 1.7 (Build 102) released May 9, 2013.

Use new role permissions for TextMap app for iPad integration

Added new TextMap permissions for Export to iPad and Import Updates from iPad. You must have TextMap 6.2 installed to take advantage of the iPad app and these new permissions.

1.7 Build 50

The following enhancements have been added to CaseMap Server version 1.7 (Build 50) released June 18, 2012.

⊟ **Create CaseMap SQL 10 cases**

Create CaseMap v10 SQL cases in the CaseMap Admin Console, in addition to creating CaseMap v9 and TextMap v6 SQL cases. The SQL Cases pane displays the case type and version number for each case.

⊟ **Upgrades CaseMap v9 SQL cases to CaseMap v10**

Use the CaseMap Admin Console to upgrade your existing CaseMap SQL cases to CaseMap 10.

⊟ **Bulk import CaseMap cases using the SQL Import Utility**

The SQL Import Utility now supports bulk importing cases to the CaseMap Server. The utility converts cases from previous CaseMap versions before converting them to SQL cases.

⊟ **Disconnect case users to perform administrative tasks**

CaseMap Server now offers the ability to force all users out of a case in order for system administrators to perform tasks requiring exclusive access. When disconnecting users, the case can also be marked as inactive to ensure that users cannot log into it.

⊟ **Set and manage index locations for SQL cases**

CaseMap Server v1.7 now supports setting up and managing case indexes for CaseMap v10 cases. Setting an index location tells CaseMap where the case index is stored for each SQL case. A default index location can also be set up for use when registering new SQL cases.

⊟ **Use new role permissions for case users**

New role permissions for CaseMap v10.0 case users are now available. CaseMap permissions include: creating cases based on version, working with spreadsheets, importing and embedding linked files, printing from DocManager, the ability to Send from Microsoft Outlook and Word, setting index locations, enabling OCR processing, and upgrading SQL cases. TextMap permissions include upgrading SQL cases.

1.6 Build 73

The following enhancement was added to the CaseMap Server version 1.6 (Build 73) released October 7, 2011.

⊟ Publish CaseMap case data on a central SharePoint location

CaseMap Server v1.6 now provides the ability to set up a CaseMap SharePoint Web Parts that allows for the display of CaseMap case data from active SQL cases. With the CaseMap SharePoint Web Parts, data is published to a central SharePoint location so staff can access and view case data without having to open a CaseMap case. Administrators can now publish case data without having to manually retrieve it from a case file.

For more information, see the About CaseMap SharePoint Web Parts topic.

1.5 Build 18

The following enhancement was added to the CaseMap Server version 1.5 (Build 18) released March 7, 2011.

⊟ Create SQL cases for TextMap

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

For more information, see the About CaseMap Server topic.

⊟ Add new users while mapping users in SQL cases

The CaseMap Admin Console now offers the ability to add new users while mapping users in a new registered SQL case.

For more information, see the Mapping Users topic and the Managing SQL Cases topic > To register an existing SQL case topics.

⊟ Create SQL cases from CaseMap templates

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

For more information, see the Configuring SQL Server for CaseMap templates and Creating SQL cases from CaseMap templates topics.

⊟ Manage TextMap SQL case Ignore Words

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

For more information, see the Accessing CaseMap Server properties.

⊟ Review updates to the New SQL Case dialog box

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

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

For more information, see the Managing SQL cases topic.

⊟ Open SQL cases from the command line

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

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

For more information, see the Opening SQL cases from the command line topic.

⊟ Automate the client connection with CaseMap Server

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

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

For more information, see the Automating the client connection with the CaseMap Server topic.

⊟ Bulk import users from Active Directory groups

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

For more information, see the Creating users topic.

⊟ Upgrade previous admin databases to CaseMap Server v1.5

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

Resolved Issues

1.8 Build 31

The following resolved issues have been added to CaseMap Server version 1.8 (Build 31) released June 30, 2014:

⊟ **Disconnect All Users did not work for TextMap 7 cases**

The Admin Console displayed an error when using the Disconnect All Users feature for a TextMap 7 case. It will now disconnect the users, just as with a TextMap 6 case.

> 📝 TextMap itself does not handle this scenario gracefully for users that still have the case open. It will display an unfriendly message when trying to load case data or save changes. Administrators should notify all case users ahead of time and have them close the case before using the Disconnect All Users feature.

⊟ **Import Local Cases sometimes failed to automatically assign users to the new TextMap SQL case**

The Import Local Cases feature attempts to match the staff members in the local TextMap case with the users registered in the Admin Console. In order to assign the users correctly, the user names in the local case had to be an exact, case-sensitive match for the CaseMap Server users. It is no longer case-sensitive.

> 📝 Admin Console 1.8, Build 32 resolved a related issue where it did not show correct details when an unexpected error occurred during the import.

1.7 Build 102

The following resolved issues have been added to CaseMap Server version 1.7 (Build 102)

released May 9, 2013:

⊟ **Disconnecting all users does not allow exclusive access to the case**

Resolved an issue where CaseMap users could not obtain exclusive access to a case (such as is required in order to create a replica) after an administrator disconnected all users via the Admin Console.

1.7 Build 37

The following resolved issues have been added to CaseMap Server version 1.7 (Build 37 for the Admin Console) released April 17, 2013:

⊟ **There was a noticeable delay when assigning a user to a case and there are 1000 or more users registered on the server**

Resolved an issue where it took 20 seconds or more to display the list of users when assigning a user to a case from the SQL Case Properties dialog box. The delay occurred only when there were 1000 or more users registered on the CaseMap Server.

1.7 Build 52

The following resolved issues have been added to CaseMap Server version 1.7 (Build 52) released March 28, 2013:

⊟ **Installation failed when bindings other than HTTP and HTTPS were configured in IIS**

Resolved an issue where the CaseMap Server installation failed if there were site bindings configured for protocols other HTTP or HTTPS. This configuration is not typical and would not affect most users.