Installing CaseMap Server

User Guide

CaseMap® Server, Version 1.8

- **System Requirements**
- **Installing CaseMap Server**
- **Installing the CaseMap Admin Console**
- **Installing the CaseMap SQL Import Utility**
- **Testing Installation**
- **Verifying Connectivity**

LexisNexis®

CaseMap Server Installation Guide

No part of this work may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information storage or retrieval system, without permission.

While the information contained herein is believed to be accurate, this work is provided "as is," without warranty of any kind. The information contained in this work does not constitute, and is not intended as, legal advice.

LexisNexis and the Knowledge Burst logo are registered trademarks of Reed Elsevier Inc., used under license. CaseMap is a registered trademark of LexisNexis, a division of Reed Elsevier Inc. Other products or services may be trademarks or registered trademarks of their respective companies.

© 2014 LexisNexis. All rights reserved.

CaseMap®
CaseMap® Server
TextMap®
TimeMap®
NoteMap®
Sanction®
Concordance®

Version: CaseMap® Server 1.8, CaseMap® Admin Console 1.8, CaseMap® SQL Import Utility 10.1
Release: February 24, 2014

Table of Contents

Chapter 1 Installing CaseMap Server 5

1 System requirements 5
2 Installing the CaseMap Server 12
- Configuring SQL Server for CaseMap Server 12
- Configuring SQL Server Service Broker 13
- Configuring SQL Server for CaseMap templates 14
- Installing CaseMap Server 18
- Automating the client connection with the CaseMap Server 29
- Opening SQL cases from the command line 30

3 Installing the CaseMap Admin Console 32
- Installing CaseMap Admin Console 32

4 Installing the CaseMap SQL Import Utility 43
- Installing the CaseMap SQL Import Utility 43

5 Testing installation 50
6 Verifying connectivity 52

Index 54

© 2014 LexisNexis. All rights reserved.

Installing CaseMap Server

User Guide

Installing CaseMap Server

Chapter

1

Installing CaseMap Server

System requirements

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

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

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

CaseMap Server v1.8

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

- 2 GHz or faster 32-bit (x86) or 64-bit (x64) processor
- 2 GB of RAM or greater
- Approximately 100 MB of free disk space on the system drive
- Super VGA (800 x 600) or higher-resolution monitor with 256 colors
- Any of the following versions of Microsoft Windows®:

  Microsoft Windows 2003 Server® 64-bit

  Microsoft Windows 2008 Server® 64-bit
- Any of the following versions of Microsoft Internet Information Server®

  Microsoft Windows Microsoft IIS 6.0® 32 and 64-bit

  Microsoft Windows Microsoft IIS 7.0® 32 and 64-bit
- Microsoft .NET Framework v3.5 and above

The CaseMap Server requires CaseMap SQL case databases to reside in Microsoft SQL Server 2005, Service Pack 2 or higher, SQL Server 2008, or SQL Server 2012.

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

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

© 2014 LexisNexis. All rights reserved.

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

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

CaseMap Admin Console v1.8

The CaseMap Admin Console is the Windows desktop application providing access to the CaseMap Server Web Service. Install the CaseMap Admin Console to the Microsoft Windows desktop of any user who will administer TextMap SQL cases and other users.

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

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

  Microsoft Windows XP Professional or Home®

  Microsoft Windows 2003 Server®

  Microsoft Windows 2008 Server®

  Microsoft Windows Vista®

  Microsoft Windows 7®

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

CaseMap SQL Import Utility v10.1

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

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

- 1 GHz or faster 32-bit (x86) or 64-bit (x64) processor

© 2014 LexisNexis. All rights reserved.

- 1 GB RAM (32-bit) or 2 GB RAM (64-bit)
- Approximately 30 MB of free disk space on the system drive
- Super VGA (800 x 600) or higher-resolution monitor with 256 colors
- Any of the following versions of Microsoft Windows®:

  Microsoft Windows XP Professional or Home®

  Microsoft Windows 2003 Server®

  Microsoft Windows 2008 Server®

  Microsoft Windows Vista®

  Microsoft Windows 7®

Review Additional Recommendations

Review the following for additional information regarding recommendations.

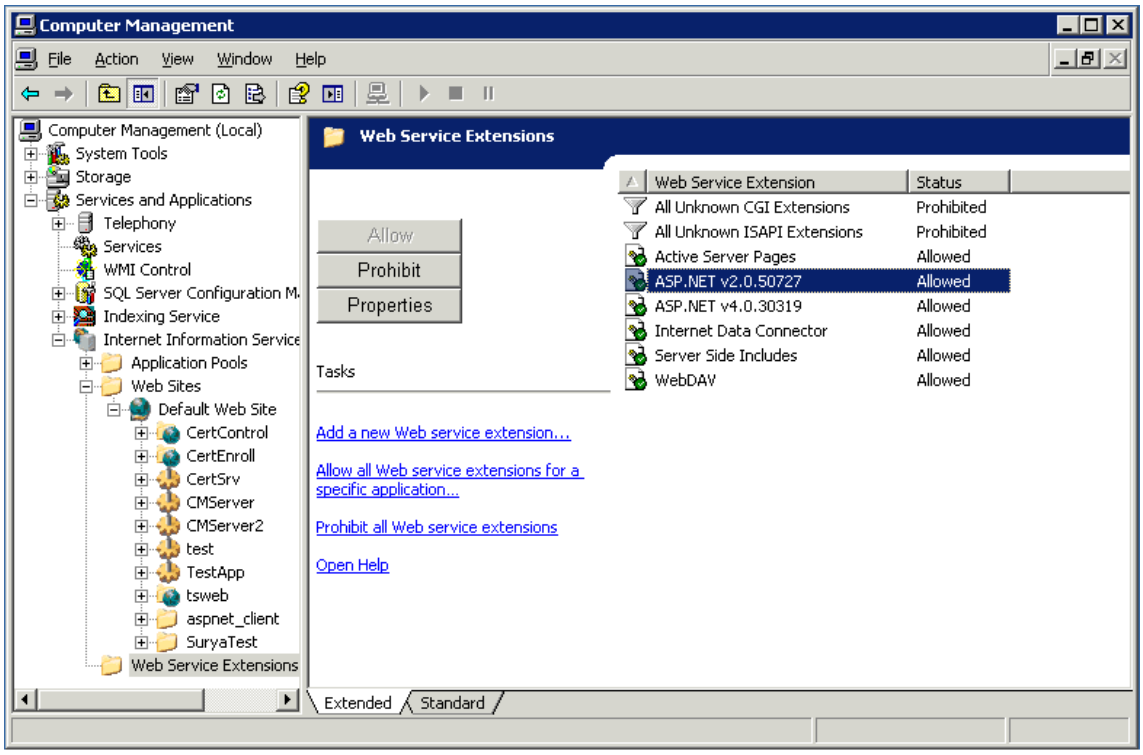
Calculating user capacity

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

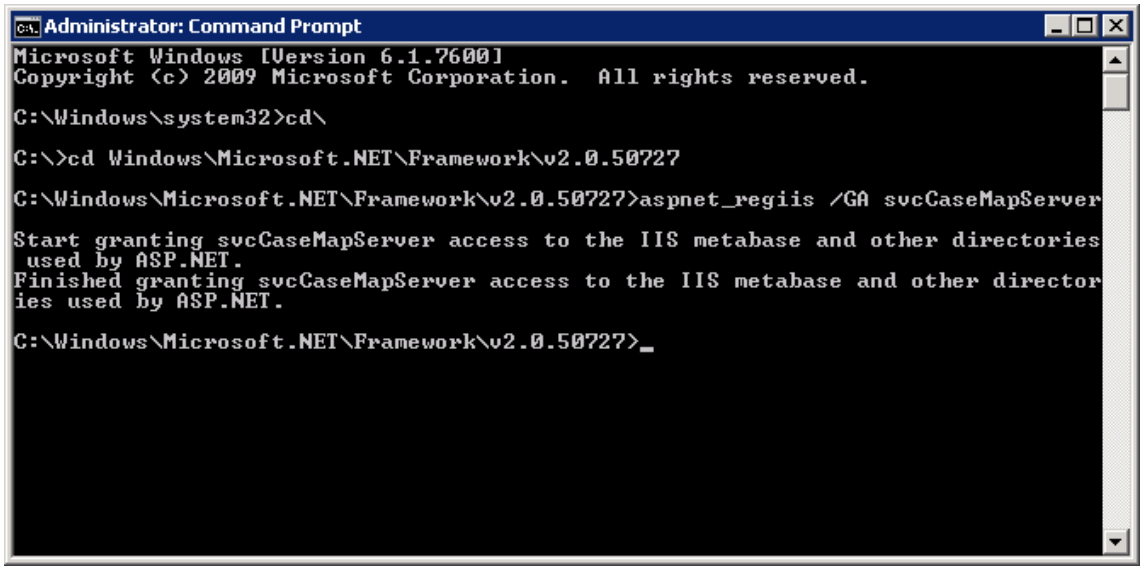
Web Servers

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

© 2014 LexisNexis. All rights reserved.

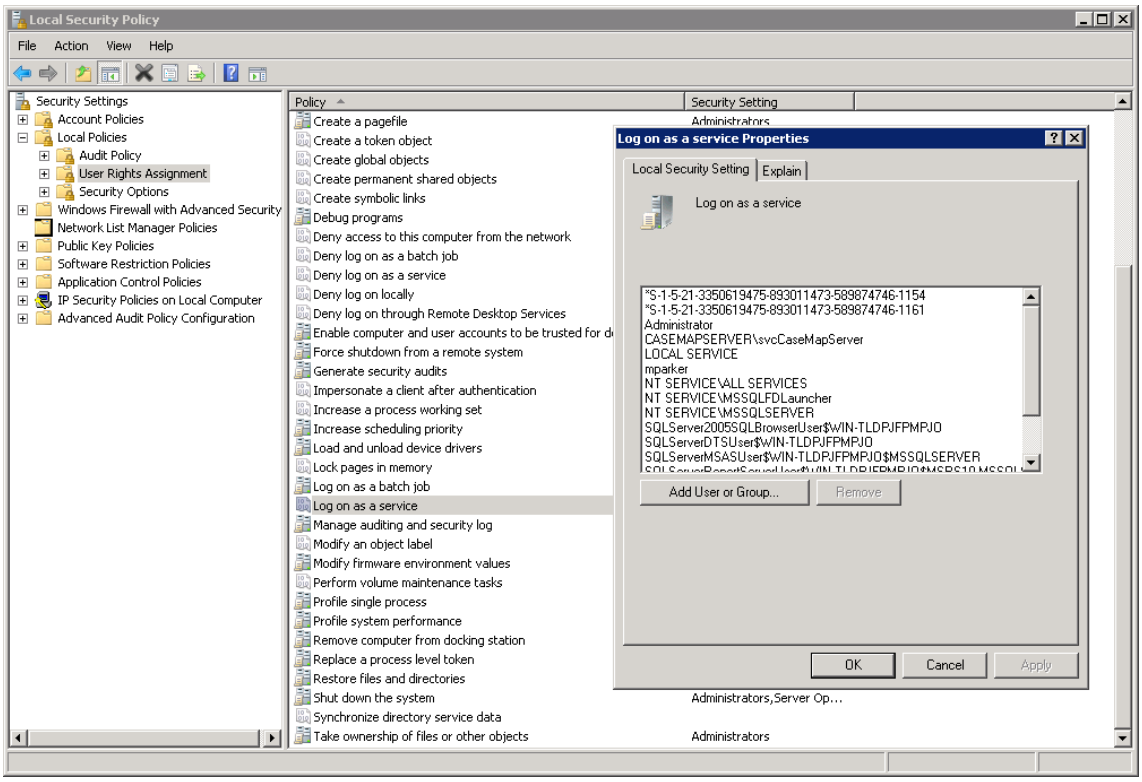


The application pool identity must be configured for IIS by running the aspnet_regiis utility. You can do this from the command line (running as Administrator).



It must also hold the Log On As Service right in the LSA.

© 2014 LexisNexis. All rights reserved.



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

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

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

Configure the WebConfig file to support SSL

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

To enable support for SSL

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

1. Locate the following:

© 2014 LexisNexis. All rights reserved.

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

2. Change Step 1 to the following:

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

3. Next locate the following:

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

4. Change Step 3 to the following:

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

© 2014 LexisNexis. All rights reserved.

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

5. Now locate the following:

```
    <!-- SSL Endpoint

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

    -->
```

6. Change Step 5 to the following:

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

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

To enable support for debugging

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

1. Locate the following text:

```
    <!-- Debugging Support

       <compilation debug="true"/>

       <customErrors mode="Off">

       -->
```

2. Change the text in Step 1 to the following:

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

       <compilation debug="true"/>

       <customErrors mode="Off">
```

Authentication Types

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

© 2014 LexisNexis. All rights reserved.

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

CaseMap Server has two authentication type options:

- **Windows Authentication (External by LDAP)** — Authentication by Lightweight Directory Access Protocol (Active Directory) for accessing SQL cases in CaseMap Server.
- **Simple Authentication** — CaseMap handles authentication for accessing cases.

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

Related Topics

About CaseMap Server

Installing CaseMap Server

Installing CaseMap Admin Console

Installing the CaseMap SQL Import Utility

Installing the CaseMap Server

Configuring SQL Server for CaseMap Server

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

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

To configure SQL Server for CaseMap Server

1. Open **Microsoft SQL Server**.
2. Connect to the database engine using a system administrator account on the server that will contain the CaseMap Server admin database.
3. In **Object Explorer**, right-click on the **Databases** folder and click **New Database**.

© 2014 LexisNexis. All rights reserved.

4. In the **New Database** dialog box, type in the name of the admin database in the **Database Name** field, then click **OK**.
5. In the **Object Explorer** pane, expand the **Security** folder, and then expand the **Logins** folder.
6. Right-click on **Logins** folder and click **New Login**.
7. In the **Login - New** dialog box, type in the login name in the **Login name** field.
8. Select the authentication type you want to use: **Windows** or **SQL**.

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

   If you choose Windows Authentication, the login name must be the same account used for Anonymous Authentication by the CaseMap Server.
9. In the **Default database** field, select the admin database you created.
10. Click **OK** to continue.

    You are now ready to install CaseMap Server.

Related Topics

About CaseMap Server
Installing CaseMap Server
Registering SQL Servers
Configuring SQL Server for CaseMap templates

Configuring SQL Server Service Broker

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

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

To check the status of Service Broker

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

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

© 2014 LexisNexis. All rights reserved.

To enable Service Broker

Alter Database [DB_NAME] Set ENABLE_BROKER

Related Topics

System requirements

Configuring SQL Server for CaseMap Server

Configuring SQL Server for CaseMap templates

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

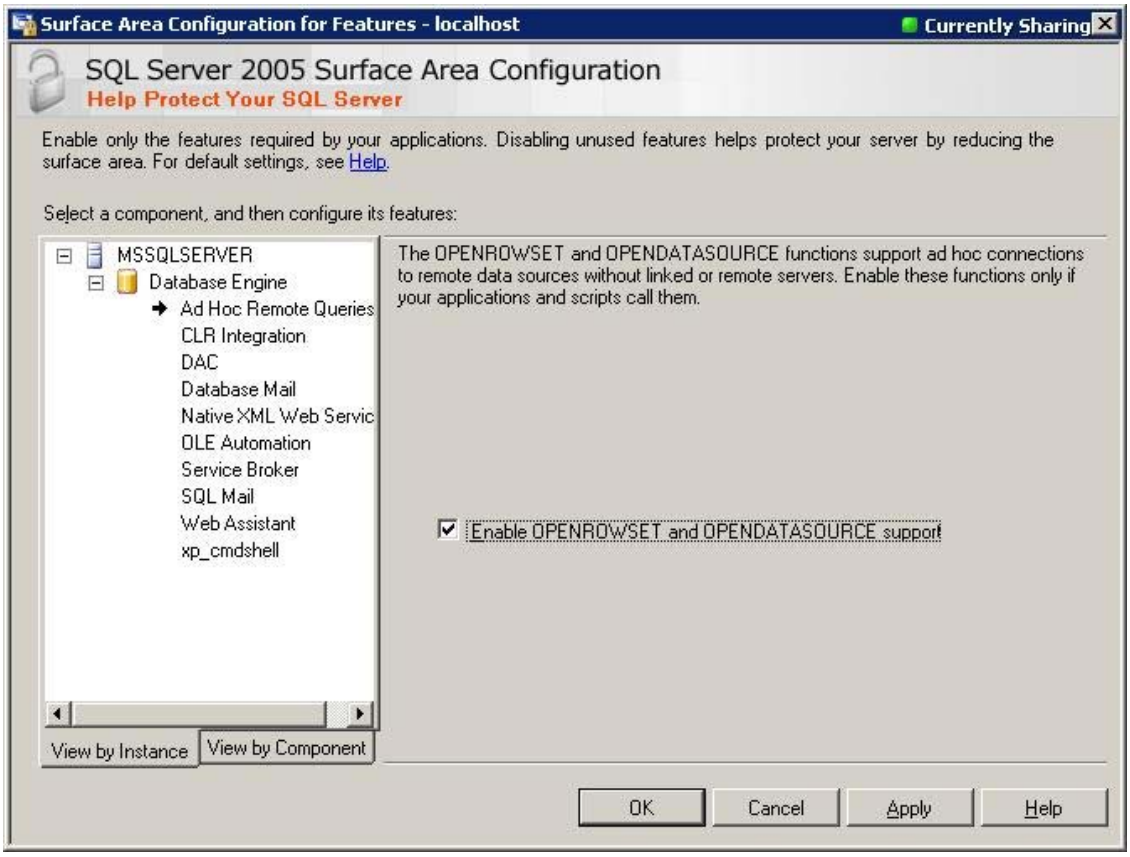
To configure SQL Server 2005 for CaseMap templates

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

© 2014 LexisNexis. All rights reserved.

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

© 2014 LexisNexis. All rights reserved.

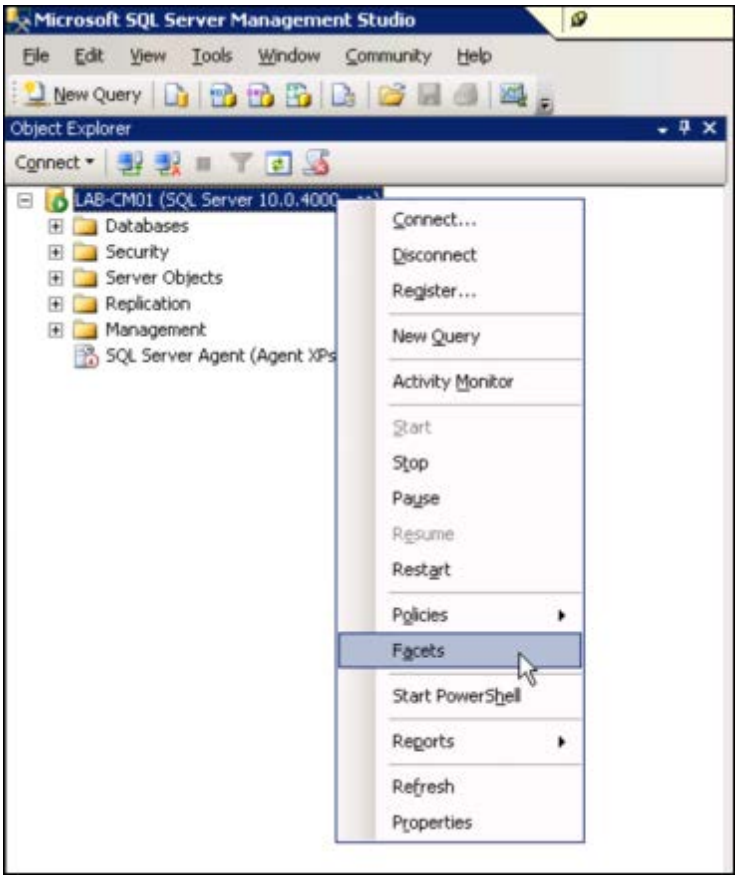


6. Click **Ad Hoc Remote Queries**.
7. Select the **Enable OPENBROWSE and OPENDATASOURCE support** check box, then click **OK**.

To configure SQL Server 2008 for CaseMap templates

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

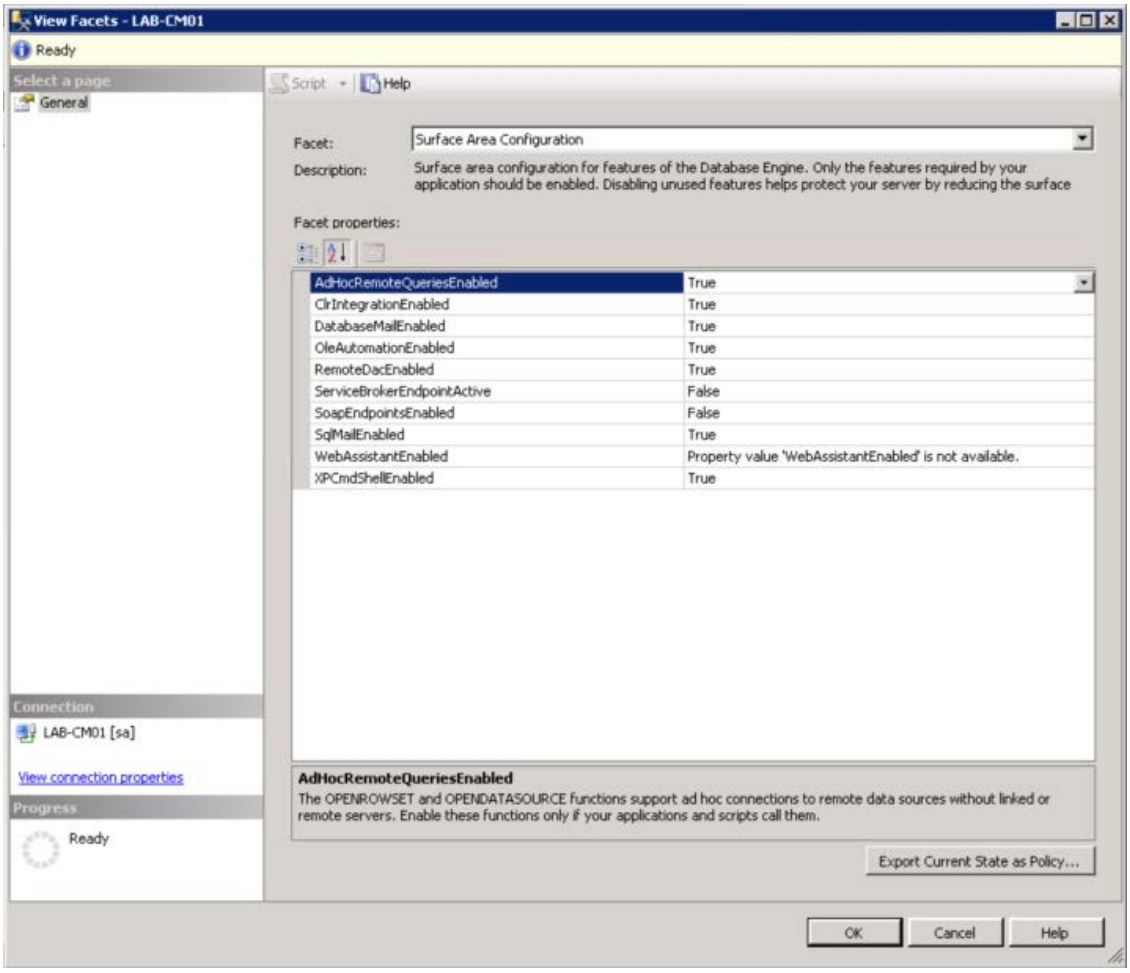
© 2014 LexisNexis. All rights reserved.



4. Click the **Facets** option.

5. In the **Facet** drop-down listing, click **Surface Area Configuration**.

© 2014 LexisNexis. All rights reserved.



6. In the **View Facets** box, click in the right column for **AdHocRemoteQueriesEnablednow** until it displays **True**.

7. Click **OK**.

Related Topics

[Configuring SQL Server for CaseMap Server]

Creating SQL cases from CaseMap templates

Installing CaseMap Server

Install the CaseMap Server to Windows® Server 2003 or 2008 inside your WAN. The CaseMap Server requires a Microsoft SQL Server 2005, SQL Server 2008, or SQL Server 2012 admin database. Creating the admin database manually is optional. If the admin database is already

© 2014 LexisNexis. All rights reserved.

created, then the installer will configure it. Otherwise, the installer will create and configure the admin database. We recommend that you install the SQL Server admin database on a different machine than that of the Microsoft IIS web server.

The CaseMap Server Web Service has two web services:

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

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

If you use Active Directory authentication for CaseMap/TextMap users, then CaseMap Server requires Microsoft Windows service account that has privileges to perform LDAP queries against Active Directory. An account without these privileges is not able to authenticate users. We recommend you set up a special account just for this purpose and assign it a permanent password.

To install CaseMap Server

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

© 2014 LexisNexis. All rights reserved.

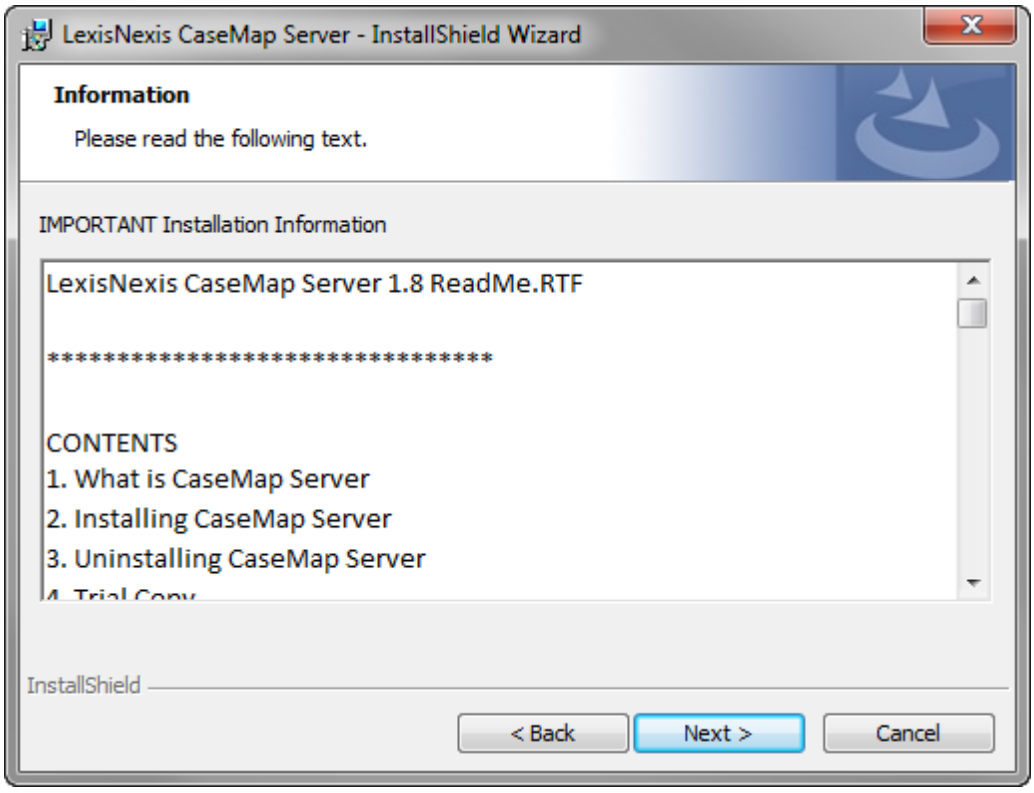
3. In the **License Agreement** dialog box, review the license agreement and select the **I accept the terms in the license agreement** option.

© 2014 LexisNexis. All rights reserved.

4. Click the **Print** button if you would like a copy of the license agreement printed at this time.

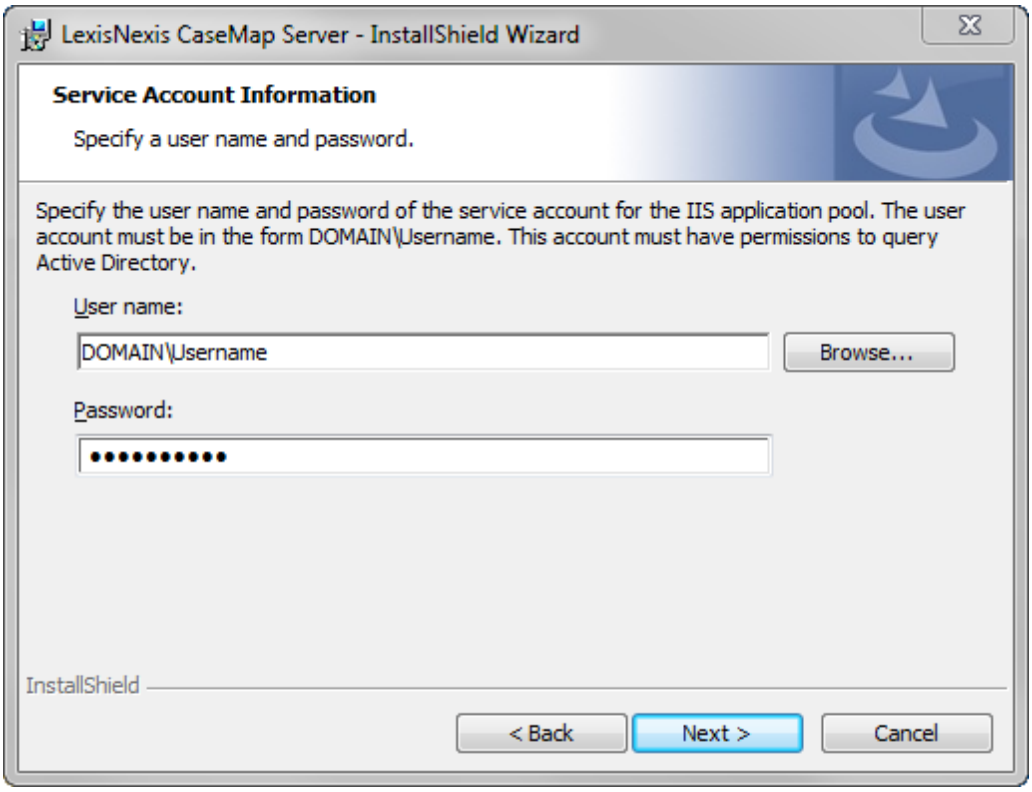
5. Click **Next** to continue.

6. In the **Information** dialog box, review important installation information.



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

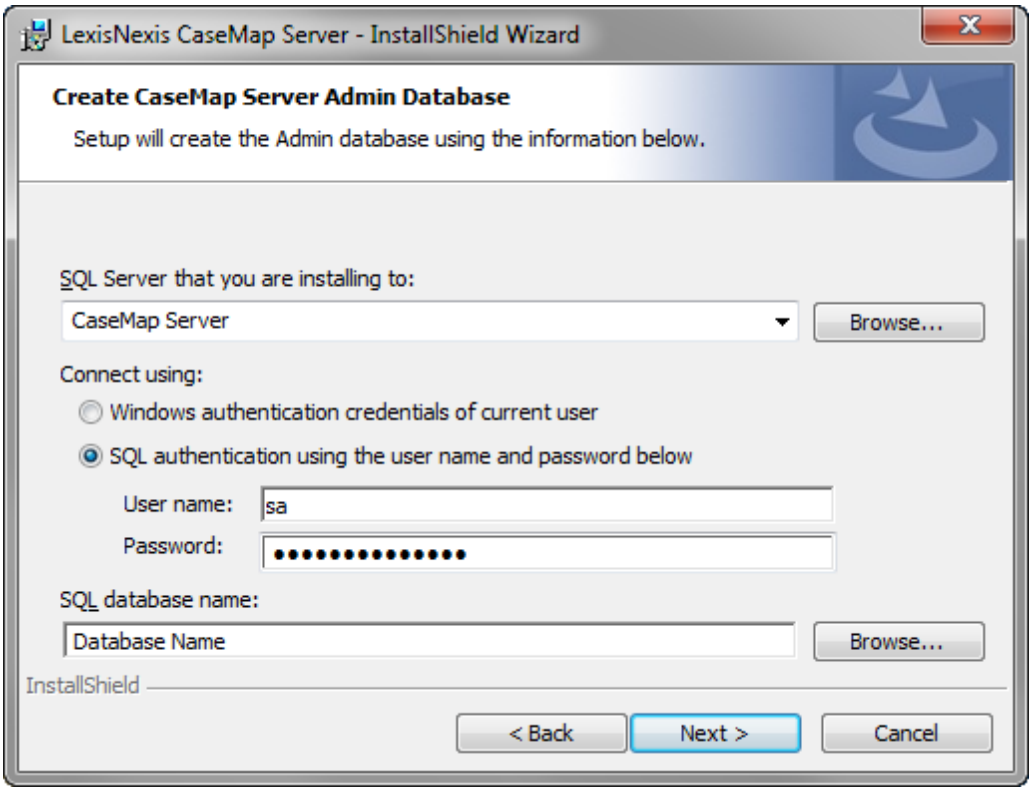
© 2014 LexisNexis. All rights reserved.



8. In the **User Name** field, type in the user account for the IIS application pool.
9. In the **Password** field, type in the user account password.

   We recommend that you set the service account password to never expire.
10. Click **Next** to open the **Create CaseMap Server Admin Database** dialog box.

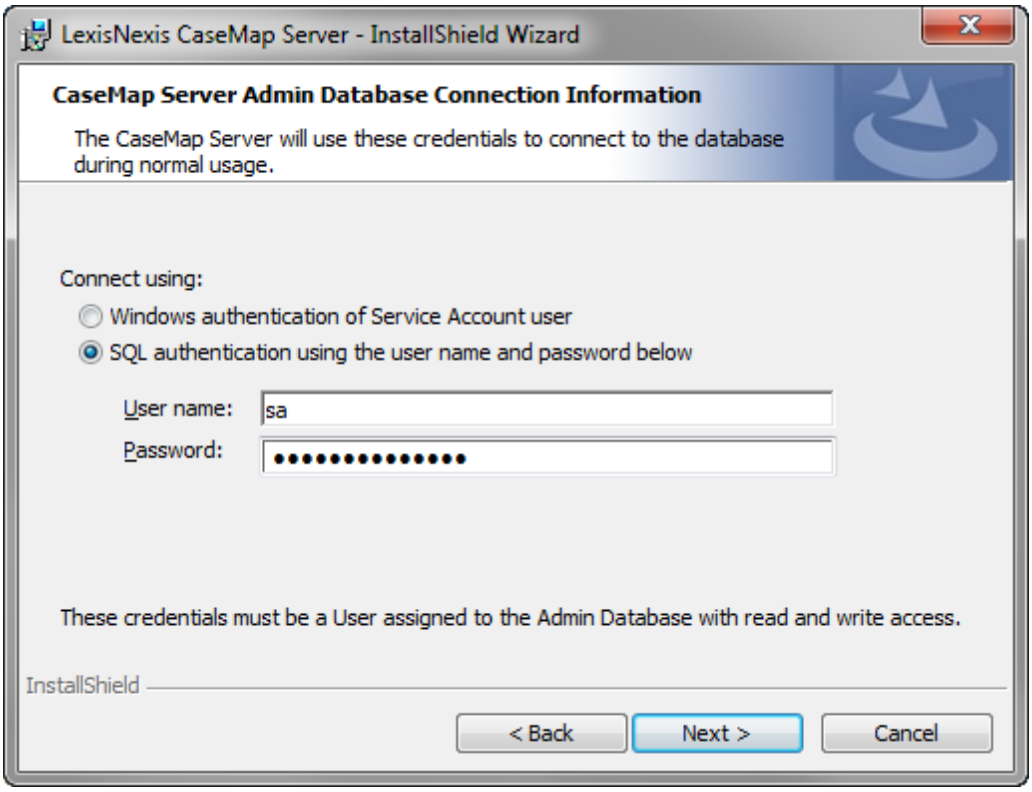
© 2014 LexisNexis. All rights reserved.



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

    If you are using SQL Authentication, type in a user name and password.
13. In the **SQL database name** field, type in the admin database name.
14. Click **Next** to open the **CaseMap Server Admin Database Connection Information** dialog box.

© 2014 LexisNexis. All rights reserved.



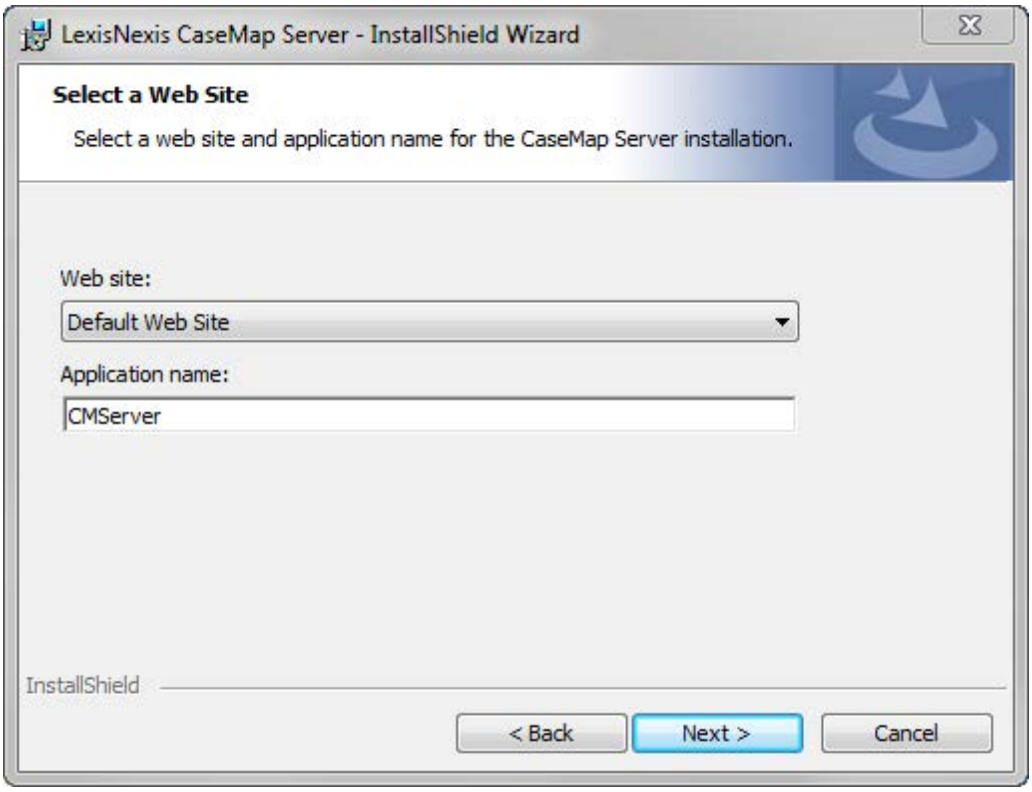
15. In the **Connect using** area, select the authentication type you want to use: Windows or SQL.

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

    Refer to Step 7 in Configuring SQL for CaseMap Server.

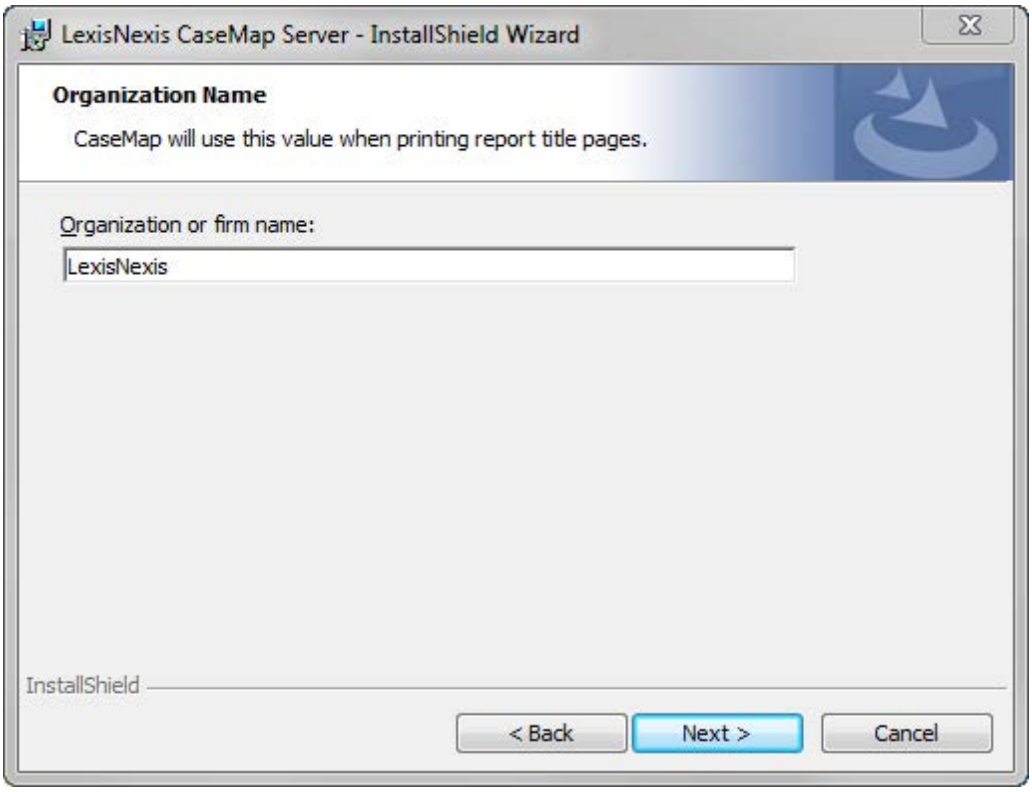
16. Click **Next** to open the **Select the web site** dialog box.

© 2014 LexisNexis. All rights reserved.



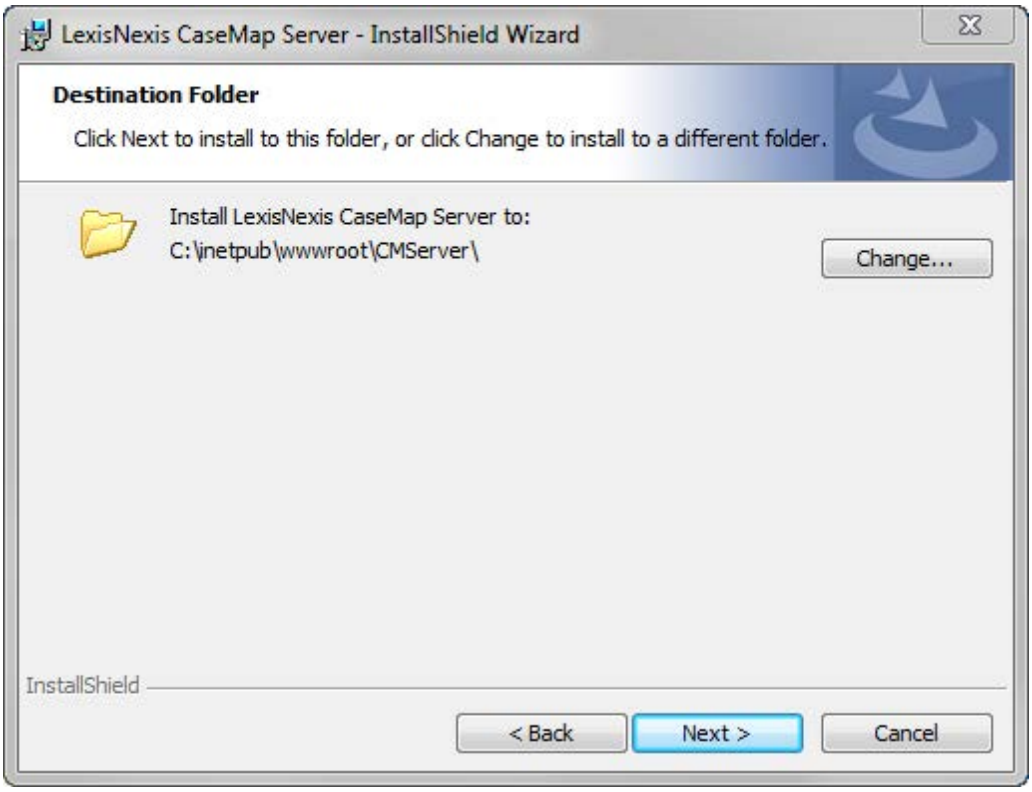
17. In the **Web site** field, type in the Web site you want to use.
18. In the **Application name** field, type in the server name.
19. Click **Next** to open the **Organization Name** dialog box.

© 2014 LexisNexis. All rights reserved.



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

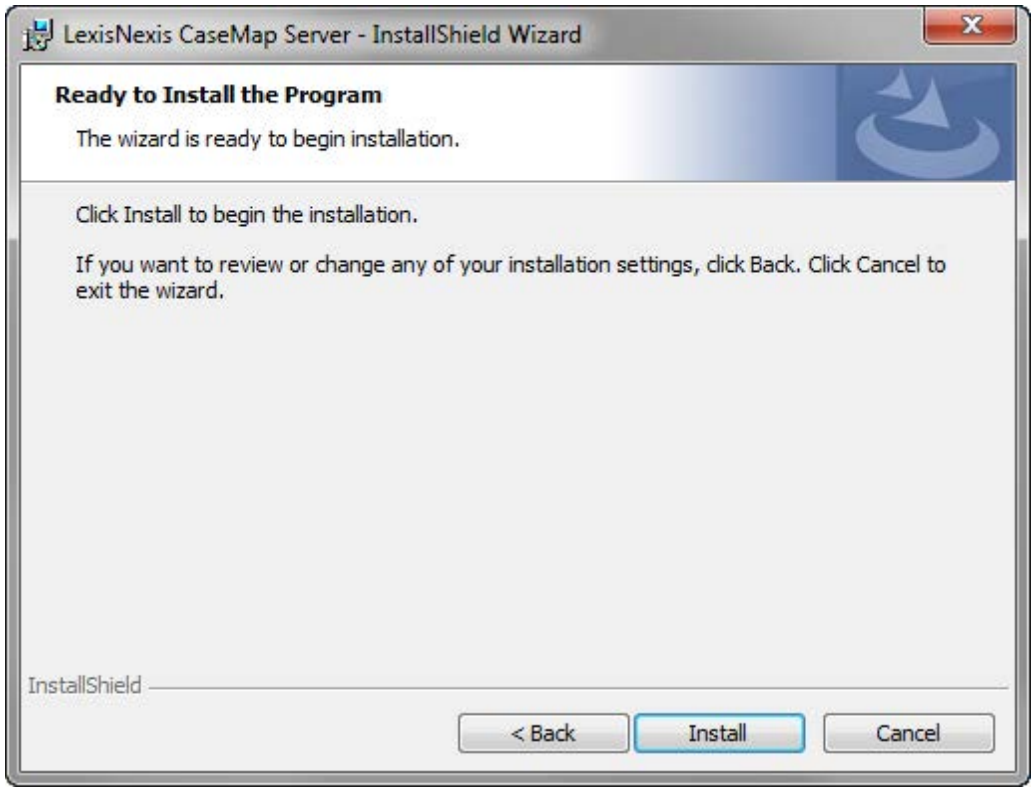
© 2014 LexisNexis. All rights reserved.



23. Click to **Next** to continue.

24. In the **Ready to Install the Program** dialog box, click **Install**.

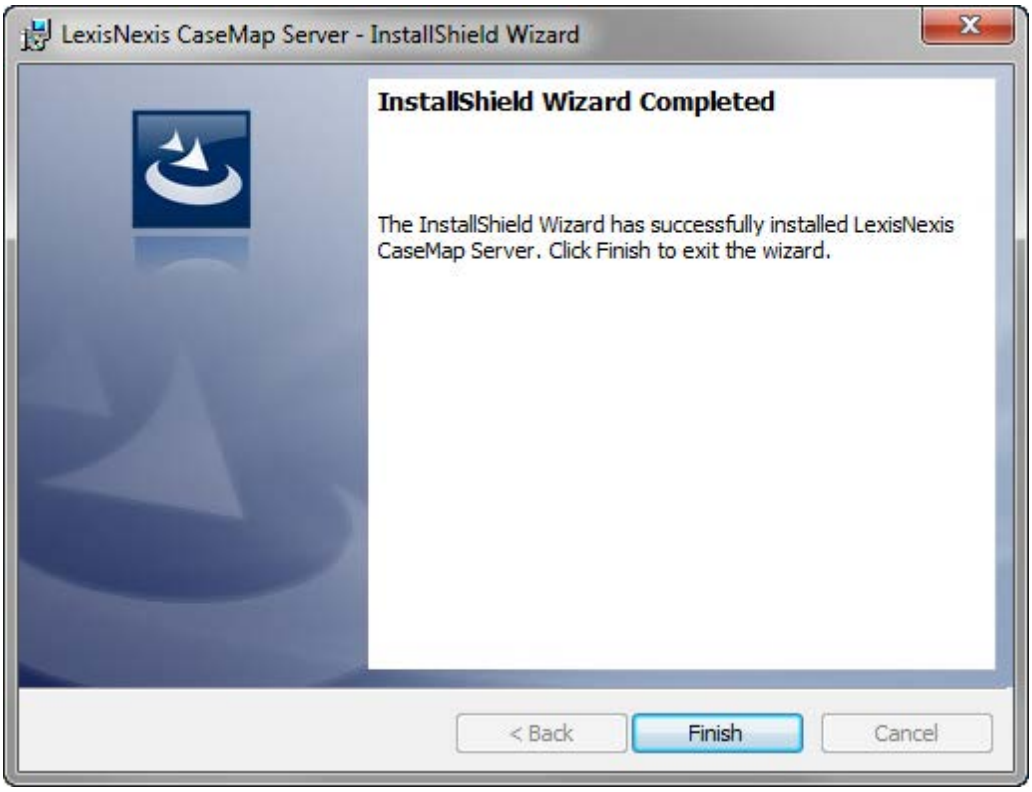
© 2014 LexisNexis. All rights reserved.



The installation wizard will install the CaseMap Server files.

25. When the **InstallShield Wizard Complete** dialog box displays, click **Finish**.

© 2014 LexisNexis. All rights reserved.



The CaseMap Server is now installed in the directory you specified.

You can now install the CaseMap Admin Console.

Related Topics

About CaseMap Server
Configuring SQL for CaseMap Server
Installing CaseMap Admin Console

Automating the client connection with the CaseMap Server

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

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

© 2014 LexisNexis. All rights reserved.

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

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

To enter command line parameters

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

CaseMap

"[PATH]\CaseMap.exe" /AutoLogOn

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

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

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

TextMap

"[PATH]\TextMap.exe" /AutoLogOn

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

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

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

Related Topics

Accessing the CaseMap Admin Console

Opening SQL cases from the command line

Opening SQL cases from the command line

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

© 2014 LexisNexis. All rights reserved.

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

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

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

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

To open a CaseMap SQL case from the command line

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

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

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

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

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

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

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

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

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

To open a TextMap SQL case from the command line

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

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

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

© 2014 LexisNexis. All rights reserved.

Related Topics

Automating the client connection with the CaseMap Server

Accessing the CaseMap Admin Console

Installing the CaseMap Admin Console

Installing CaseMap Admin Console

The CaseMap Admin Console is the Windows desktop application providing user interface access for the CaseMap Server. Installation of the CaseMap Admin Console is fairly simple and done using an install wizard. Install the CaseMap Admin Console to the desktop of any user who will be administering CaseMap and TextMap cases and users. The CaseMap Admin Console supports both Windows and simple authentication.

The install utility will prompt you to enter the URL to the CaseMap Server. The URL should end with "CMServerAdmin.svc".

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

- User Name = sysadmin
- Password = password

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

After installing the CaseMap Admin Console, you can register one or more SQL Servers inside your organization that will host your CaseMap or TextMap SQL cases.

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

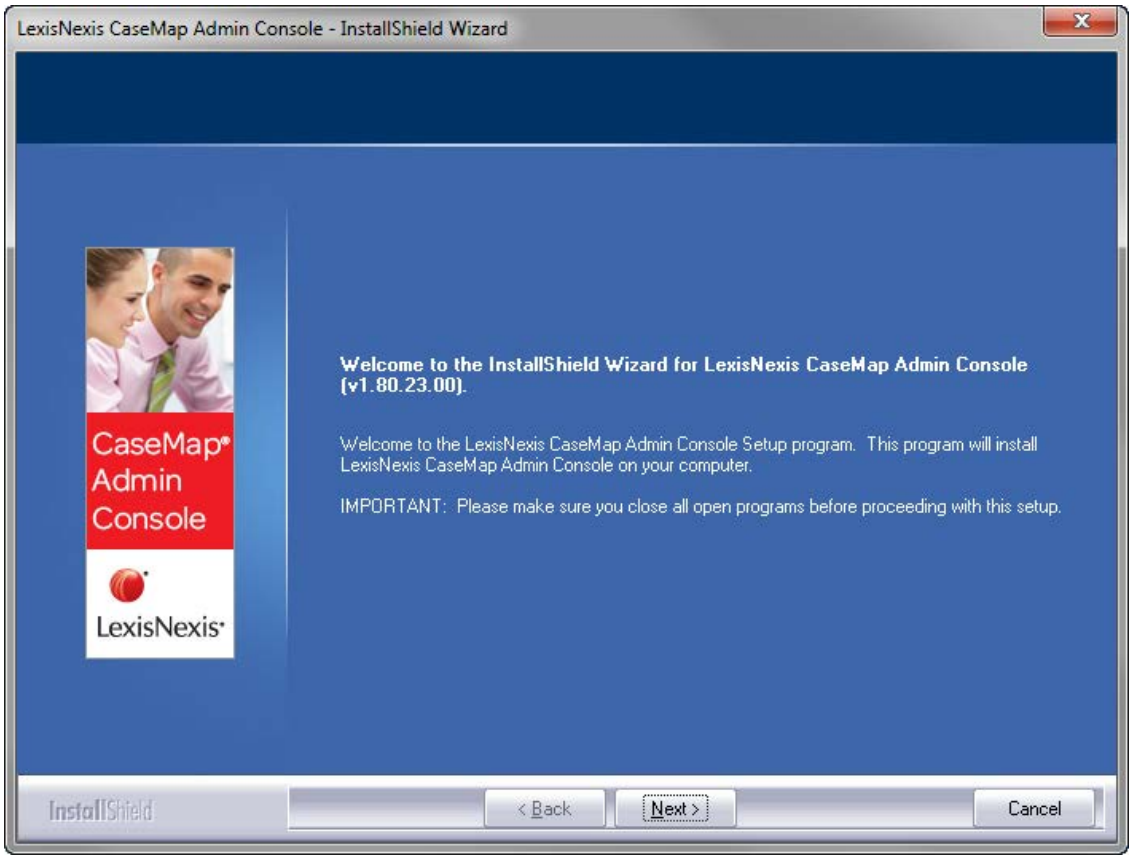
- CaseMap or TextMap client users who need access to SQL cases
- CaseMap Admin Console users who can administer cases and users

The CaseMap Admin Console is the only place you can create new CaseMap or TextMap SQL cases. Once the case is created, you can assign it to users with local or Active Directory type authentication. Use the CaseMap SQL Import Utility or the Import Local Cases Utility to migrate existing case files from the Access database format to the SQL database format. See About migrating cases.

© 2014 LexisNexis. All rights reserved.

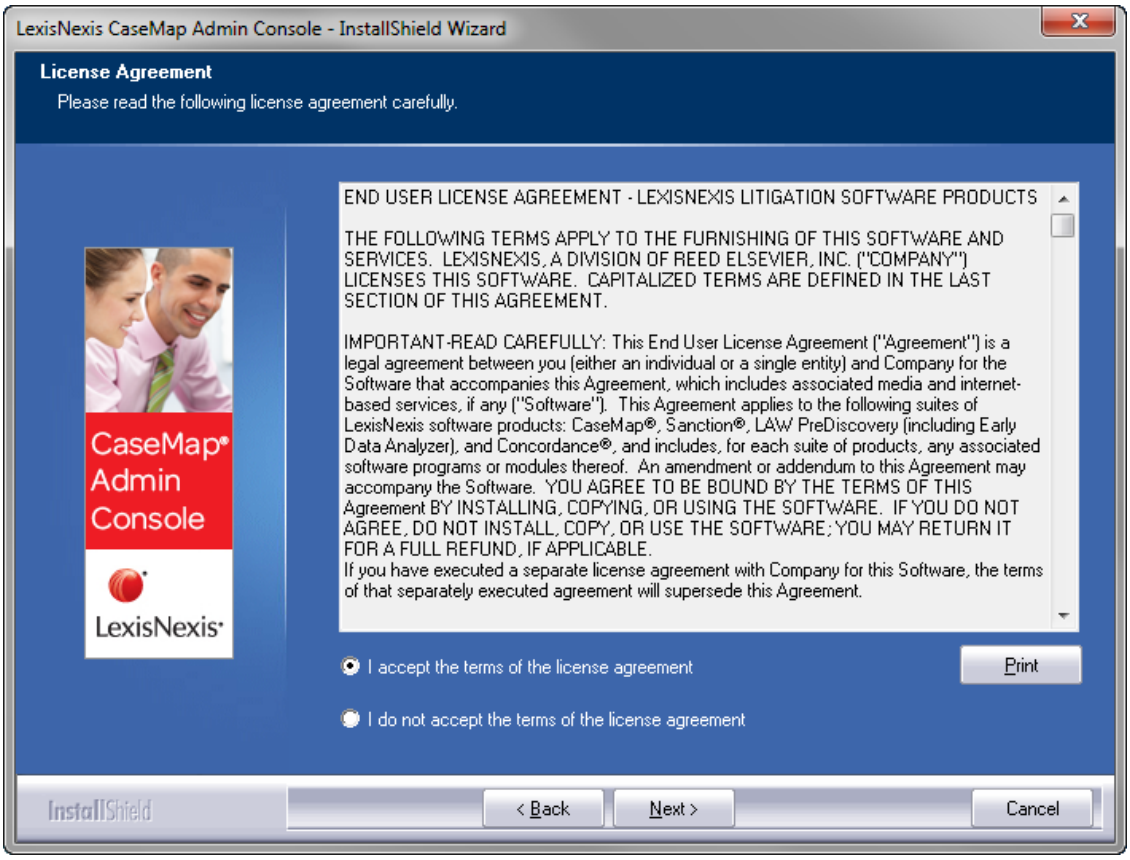
To install the CaseMap Admin Console

1. Click on the **CMAdminSetup.exe** file to launch the CaseMap Admin Console install utility.
2. When the **InstallShield Wizard** launches, click **Next**.



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

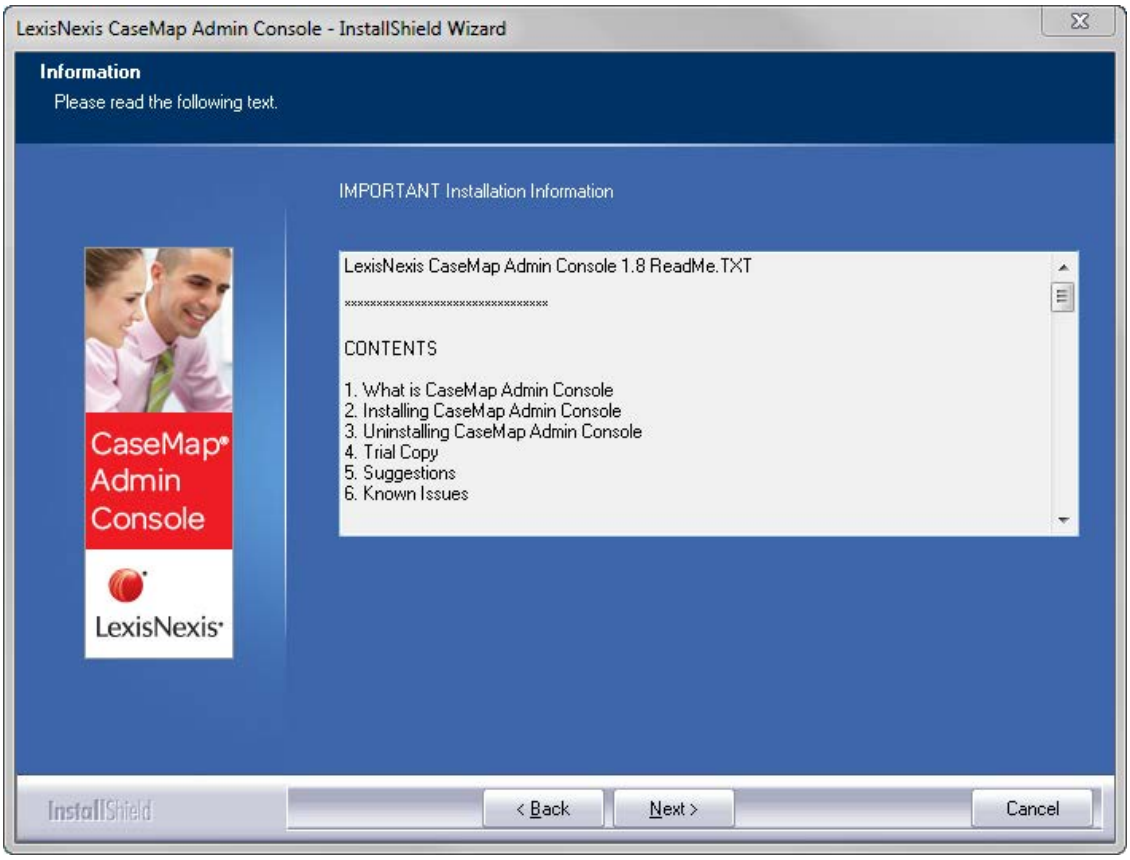
© 2014 LexisNexis. All rights reserved.



4. Click the **Print** button to print a copy of the license agreement, then click **Next**.

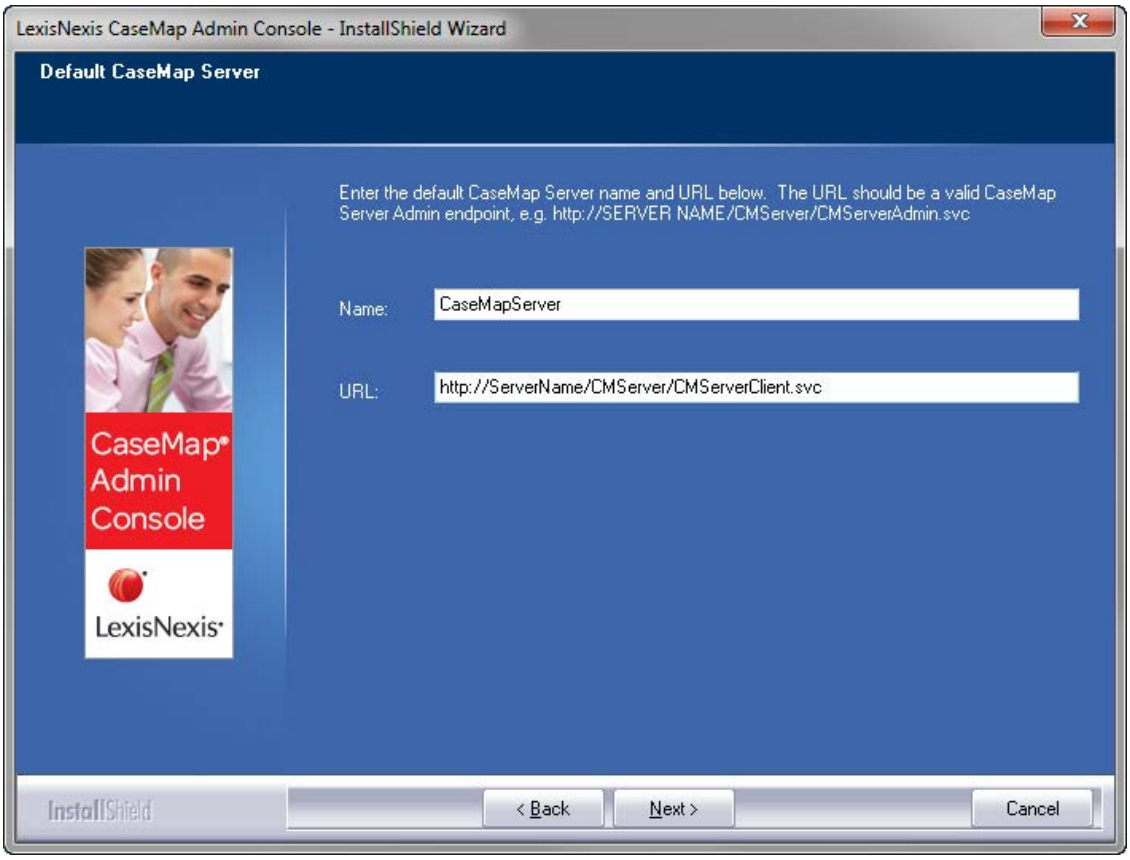
5. In the **Information** dialog box, review the important installation information, then click **Next**.

© 2014 LexisNexis. All rights reserved.



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

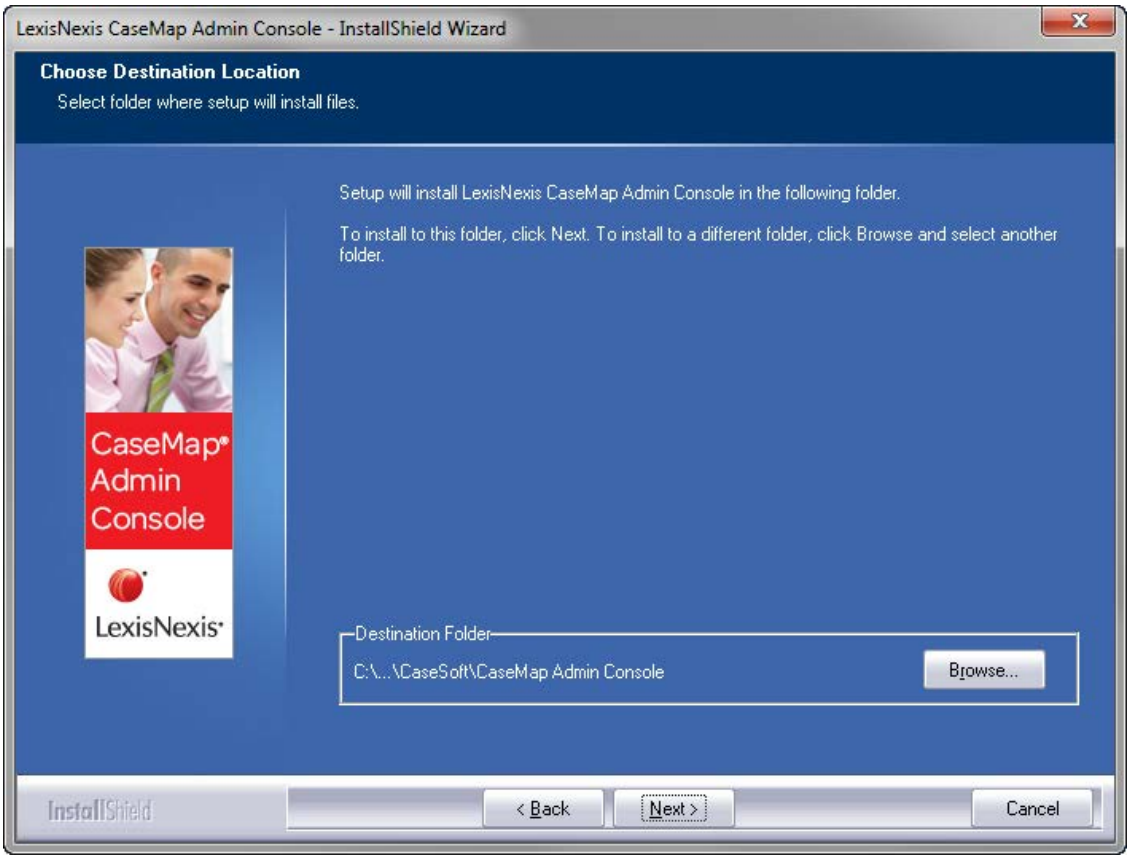
© 2014 LexisNexis. All rights reserved.



7. In the **URL** field, type in the Server URL, then click **Next**.

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

© 2014 LexisNexis. All rights reserved.

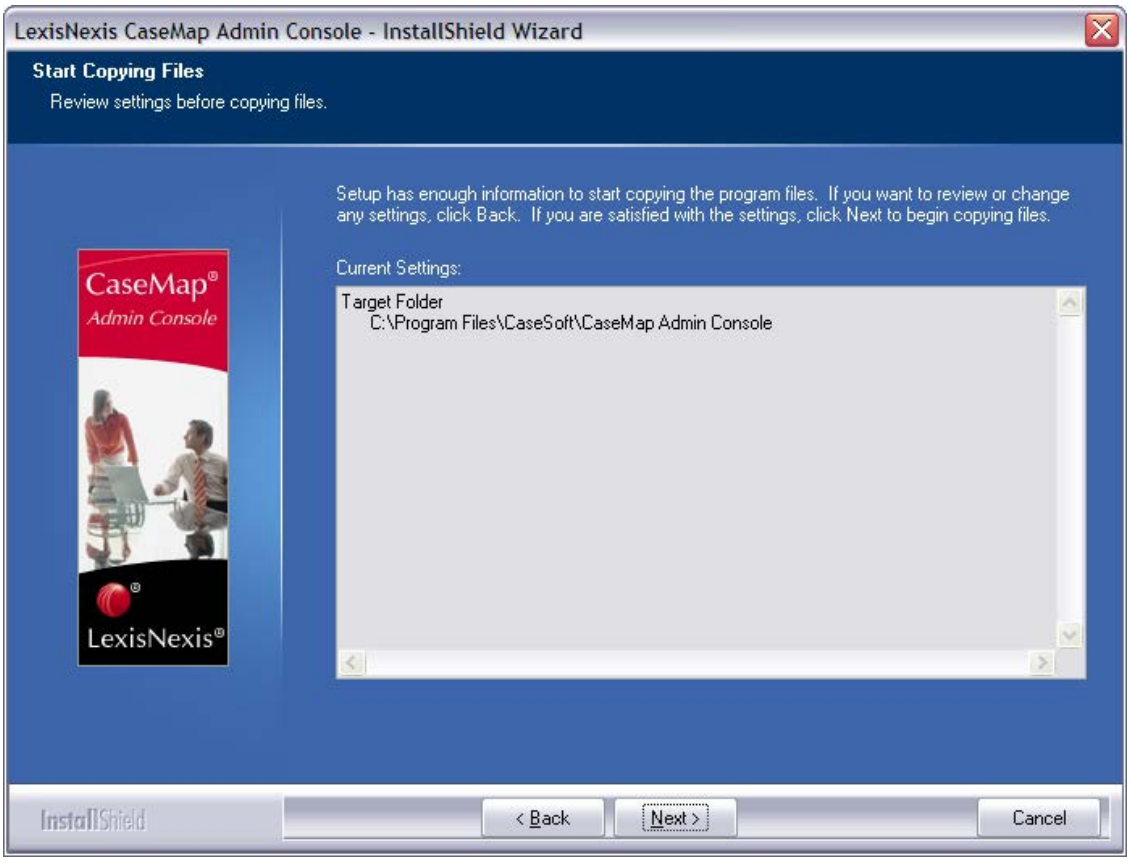


The default folder is C:\Program Files\CaseSoft\CaseMap Admin Console.

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

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

© 2014 LexisNexis. All rights reserved.

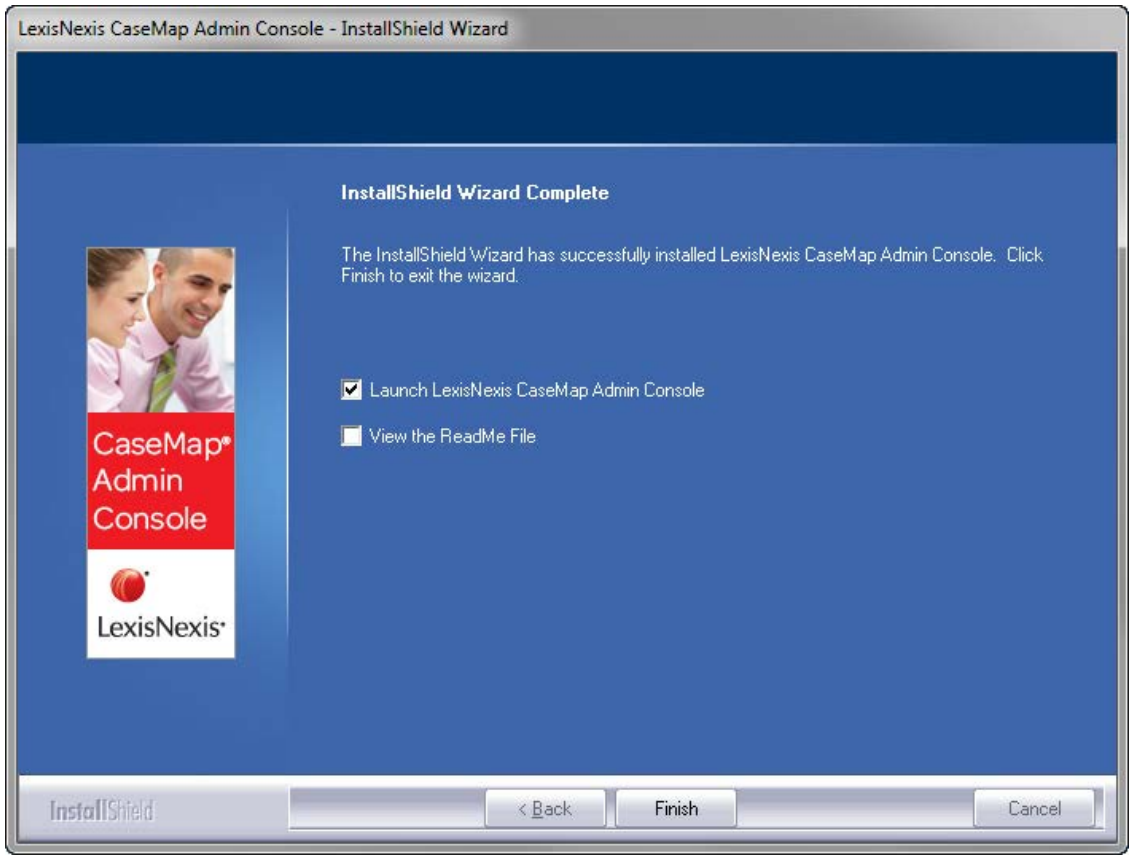


If you want to modify any settings, click the Back button.

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

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

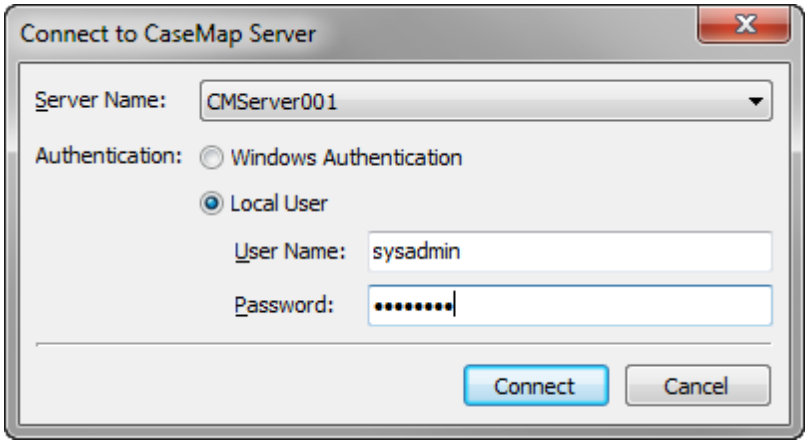
© 2014 LexisNexis. All rights reserved.



12. Click **Finish**.

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

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



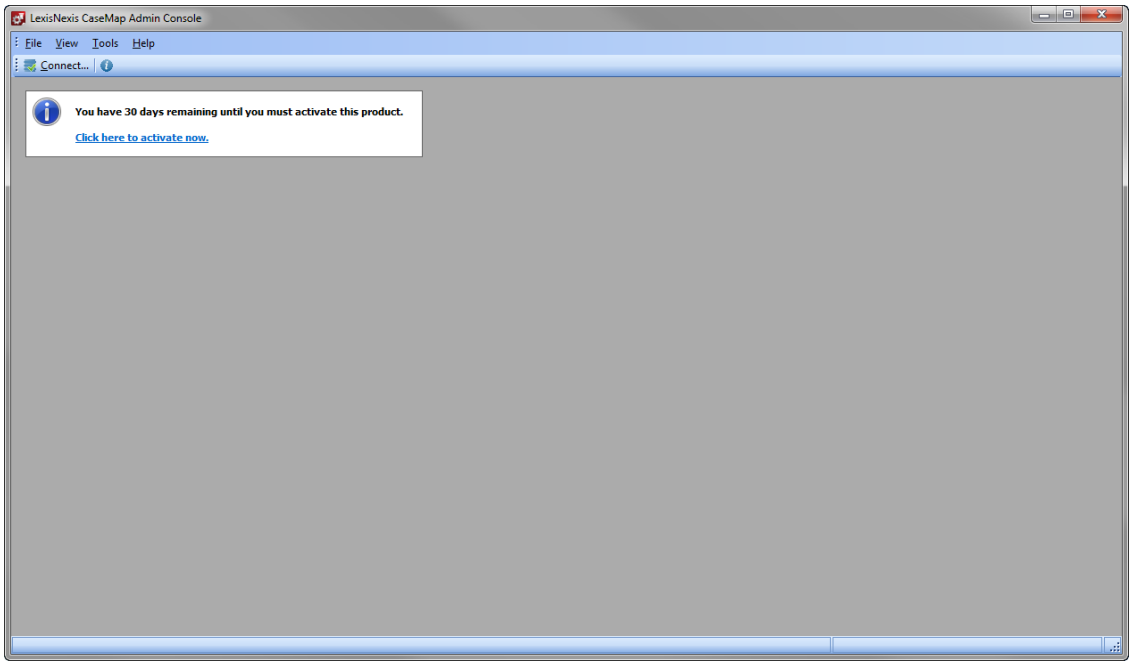
14. In the **User Name** field, type *sysadmin*.

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

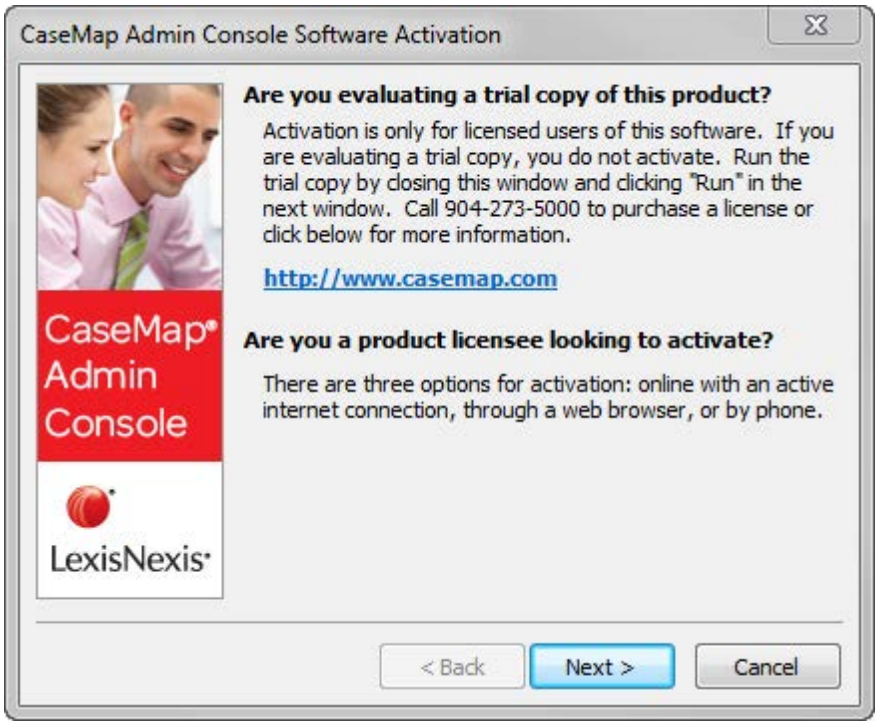
© 2014 LexisNexis. All rights reserved.

16. Click **Connect** to continue.

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

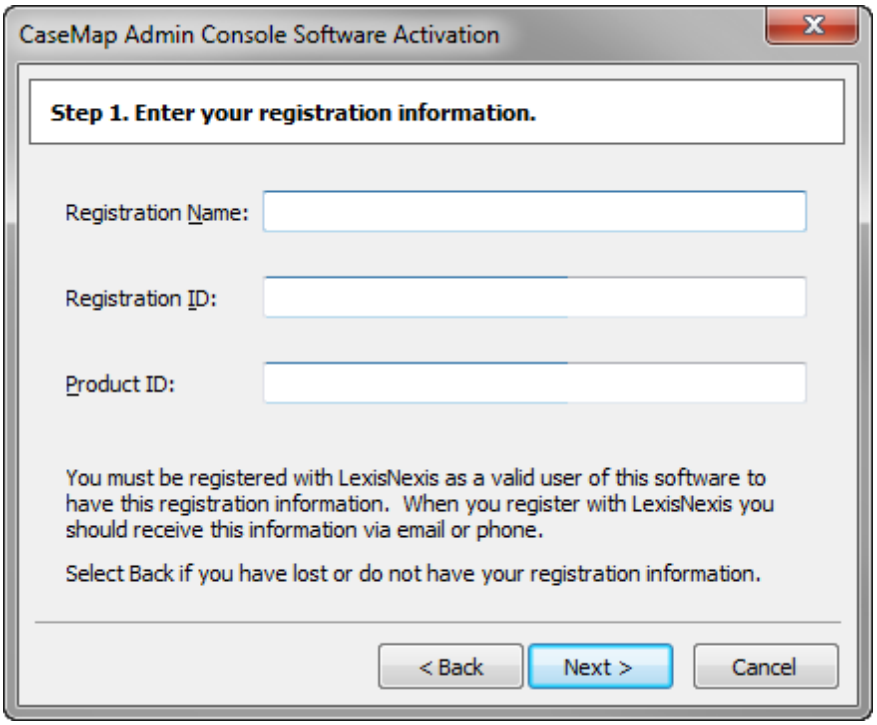


18. In the **CaseMap Admin Console Software Activation** dialog box, click **Next** to open the **Enter your registration information** dialog box.



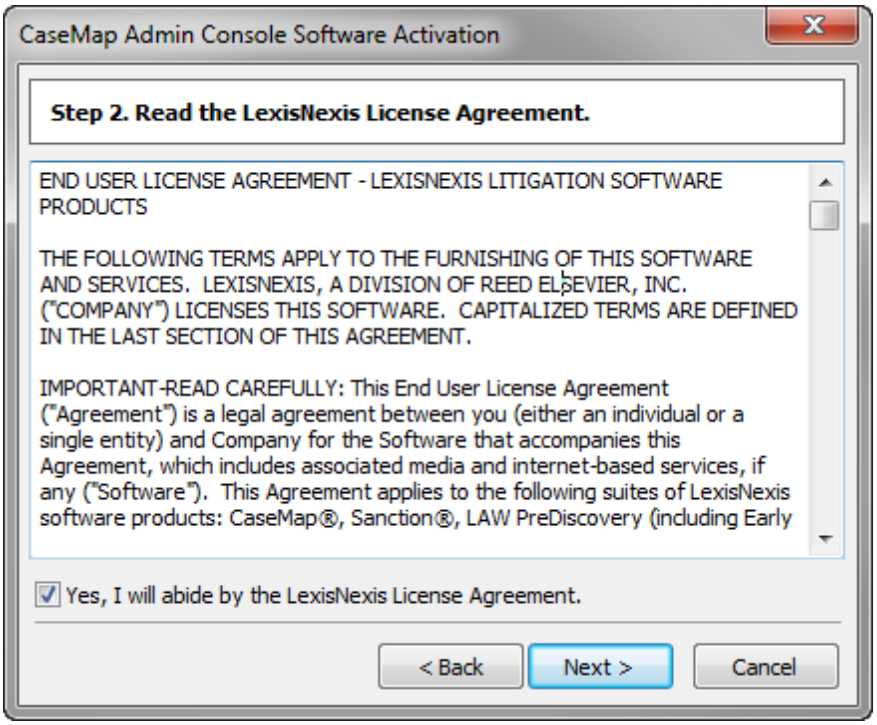
19. In the **Registration Name** field, type in your user name for license registration.

© 2014 LexisNexis. All rights reserved.



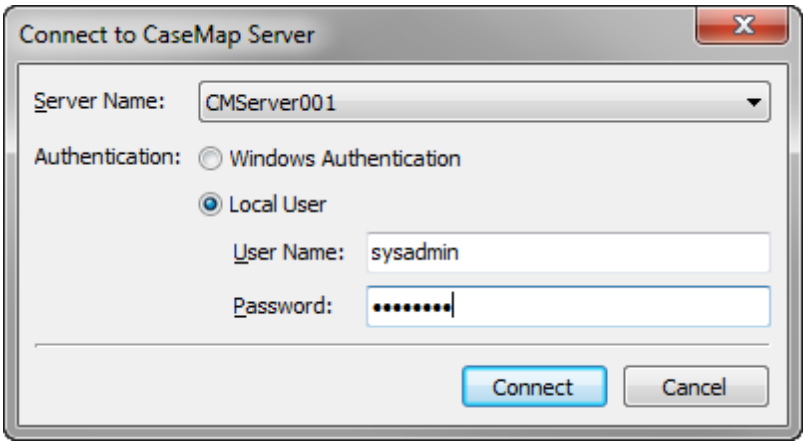
20. In the **Registration ID** field, type in your registration ID.
21. In the **Product ID** field, type in the TextMap license number.
22. Click **Next** to continue.
23. In the **Read the LexisNexis License Agreement** dialog box, read the license agreement and then select the **Yes, I will abide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

© 2014 LexisNexis. All rights reserved.



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

© 2014 LexisNexis. All rights reserved.



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

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

    You can now install the CaseMap SQL Import Utility program, if you plan on migrating existing CaseMap local cases to the CaseMap Server.

Related Topics

About CaseMap Server
Installing CaseMap Server
Installing the CaseMap SQL Import Utility

Installing the CaseMap SQL Import Utility

Installing the CaseMap SQL Import Utility

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

After you import an Access case into a SQL Server database, use the CaseMap Admin Console to register the case database and then assign it to users. Once a local case is converted to the new version format, users can no longer access it in older versions of CaseMap.

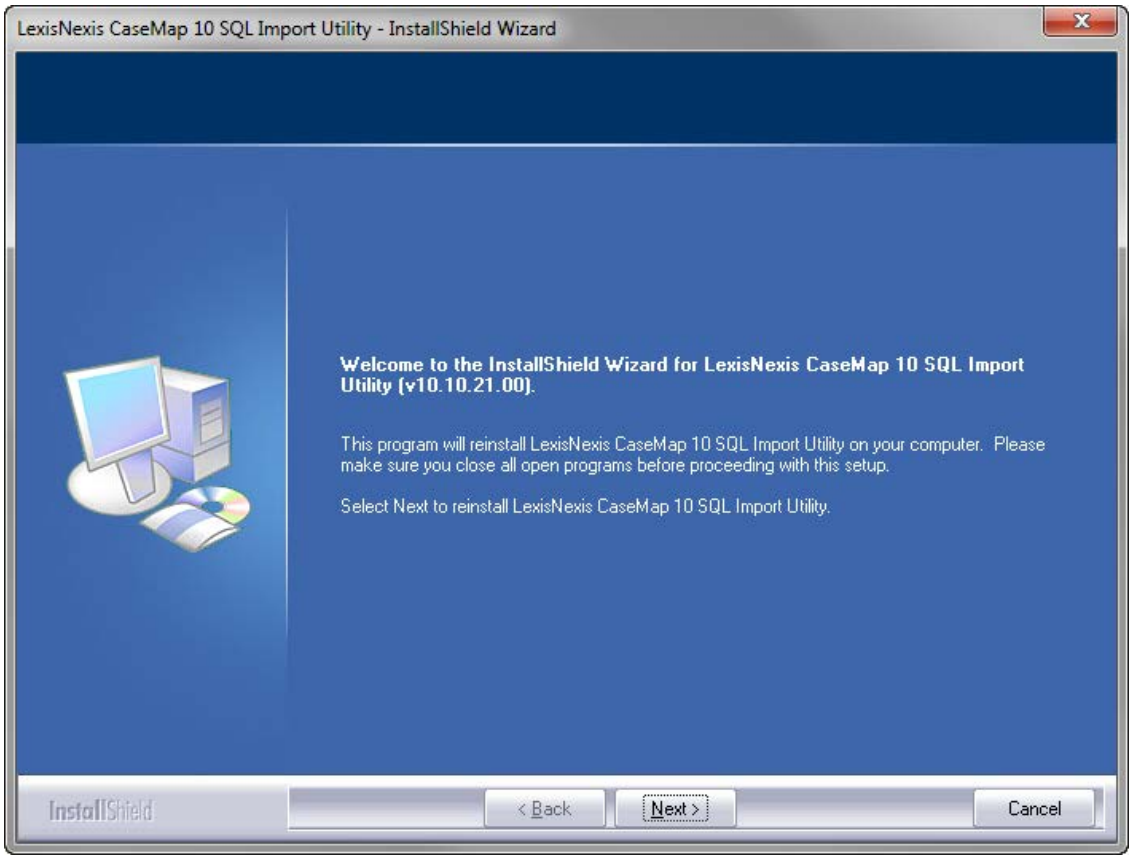
The utility program will install to C:\Program Files\CaseSoft\CaseMap SQL Import. No local

© 2014 LexisNexis. All rights reserved.

machine registry settings are required.

How to install the CaseMap SQL Import Utility

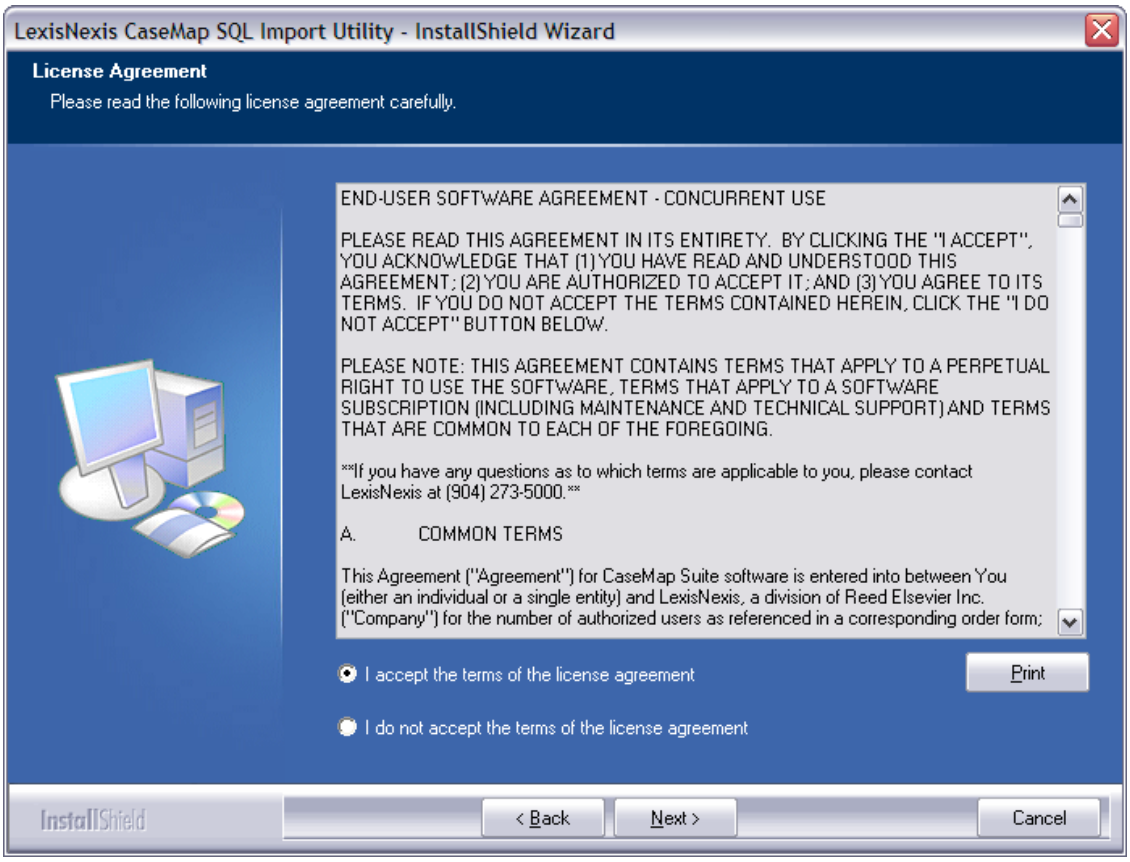
1. Click on the **CMSQLImportSetup.exe** file to launch the CaseMap SQL Import utility.
2. When the import wizard launches, click **Next**.



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

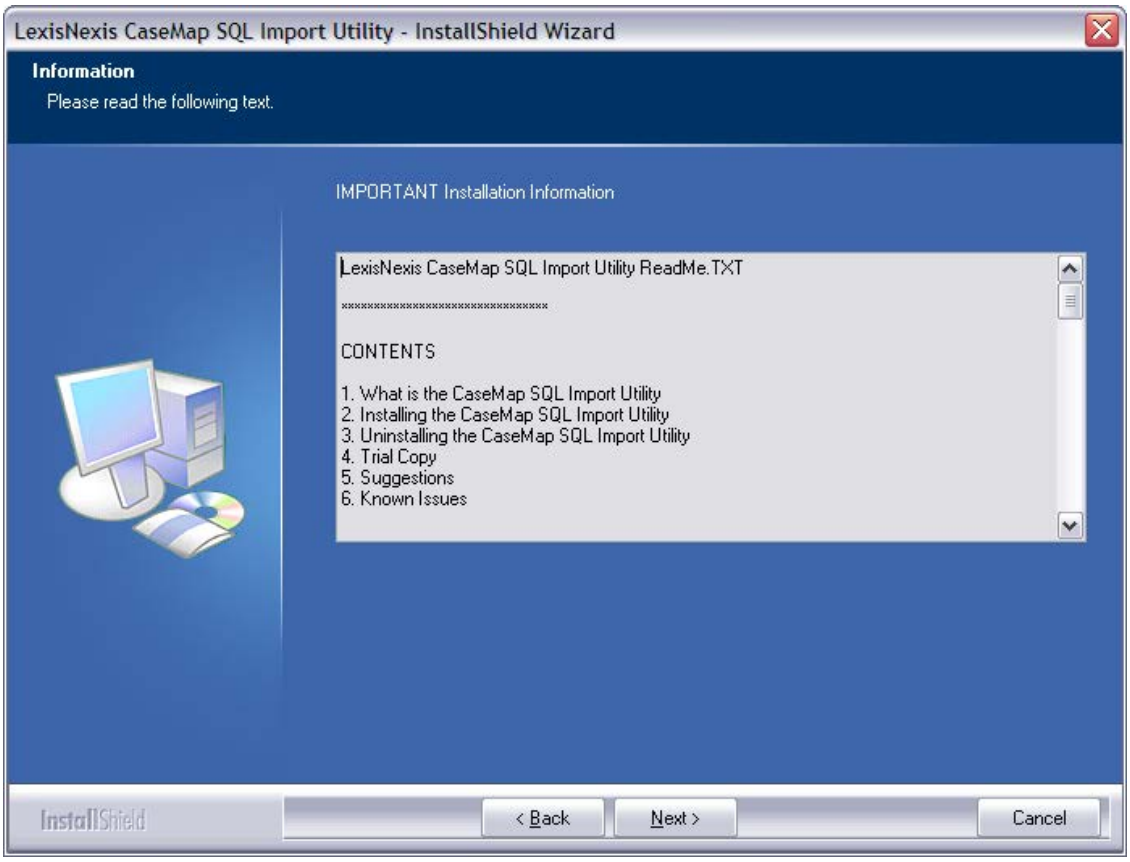
   If you would like to print a copy of the license agreement at this time, click the Print button.

© 2014 LexisNexis. All rights reserved.



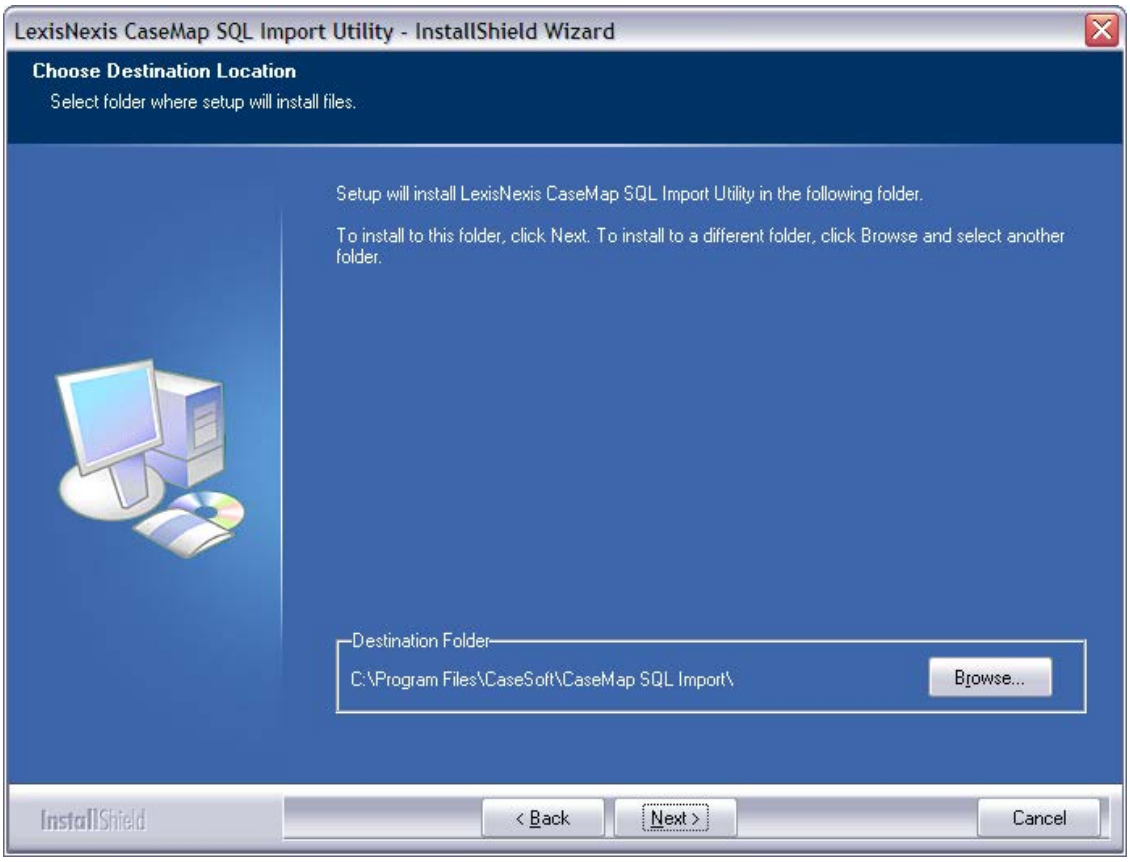
4. Click **Next** to continue.
5. In the **Information** dialog box, review installation information, then click **Next**.

© 2014 LexisNexis. All rights reserved.



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

© 2014 LexisNexis. All rights reserved.

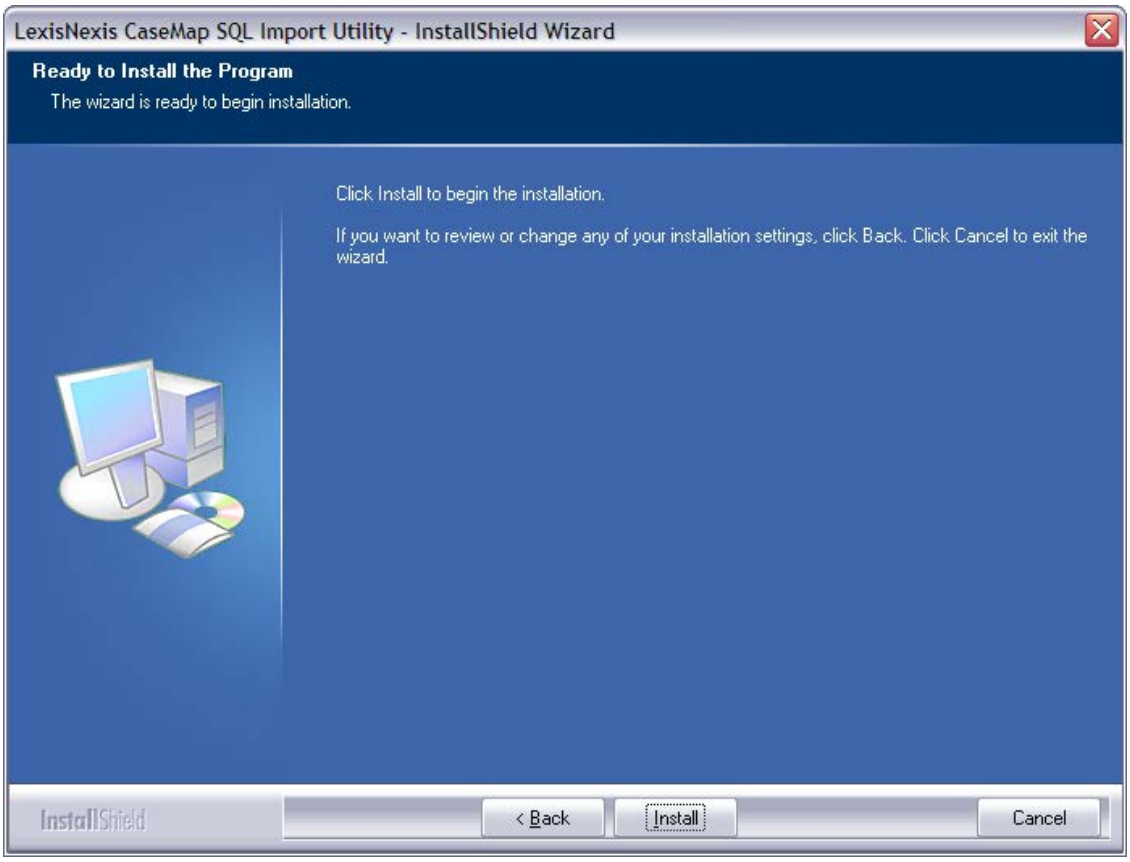


The default folder is C:\Program Files\CaseSoft\CaseMap SQL Import\.

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

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

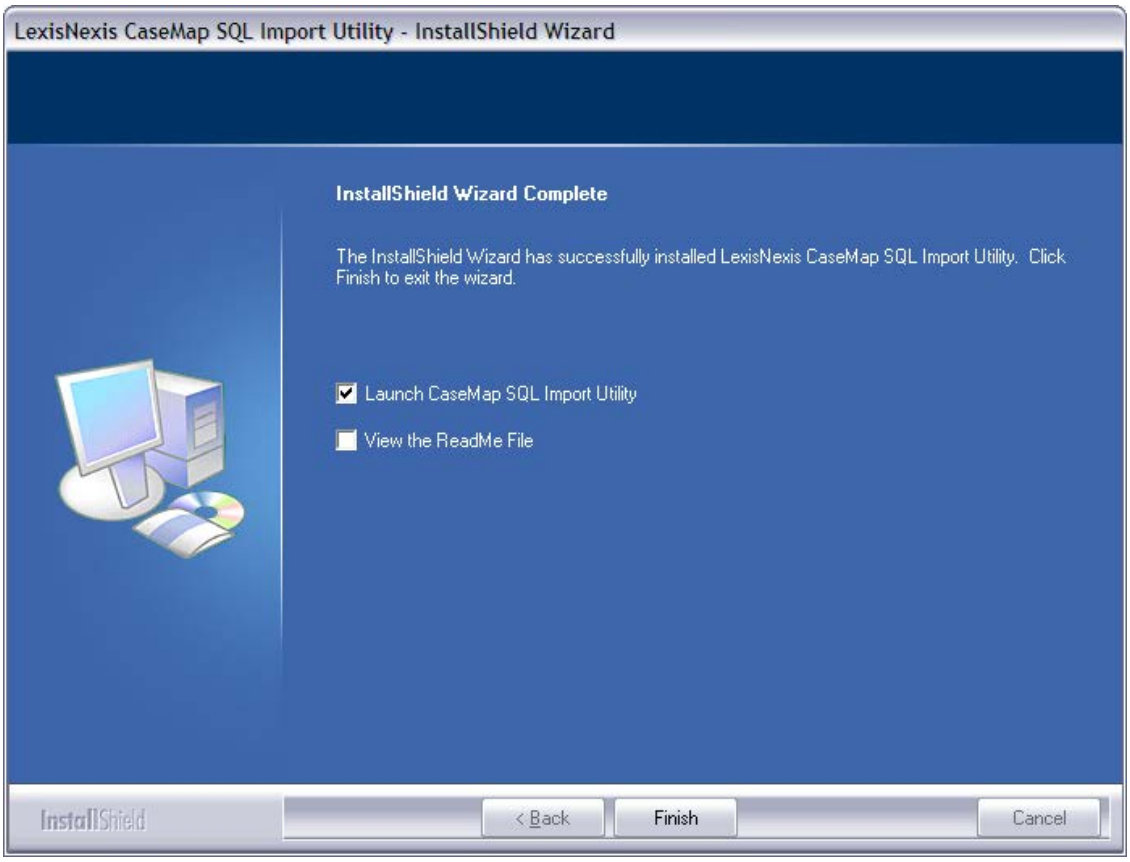
© 2014 LexisNexis. All rights reserved.



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

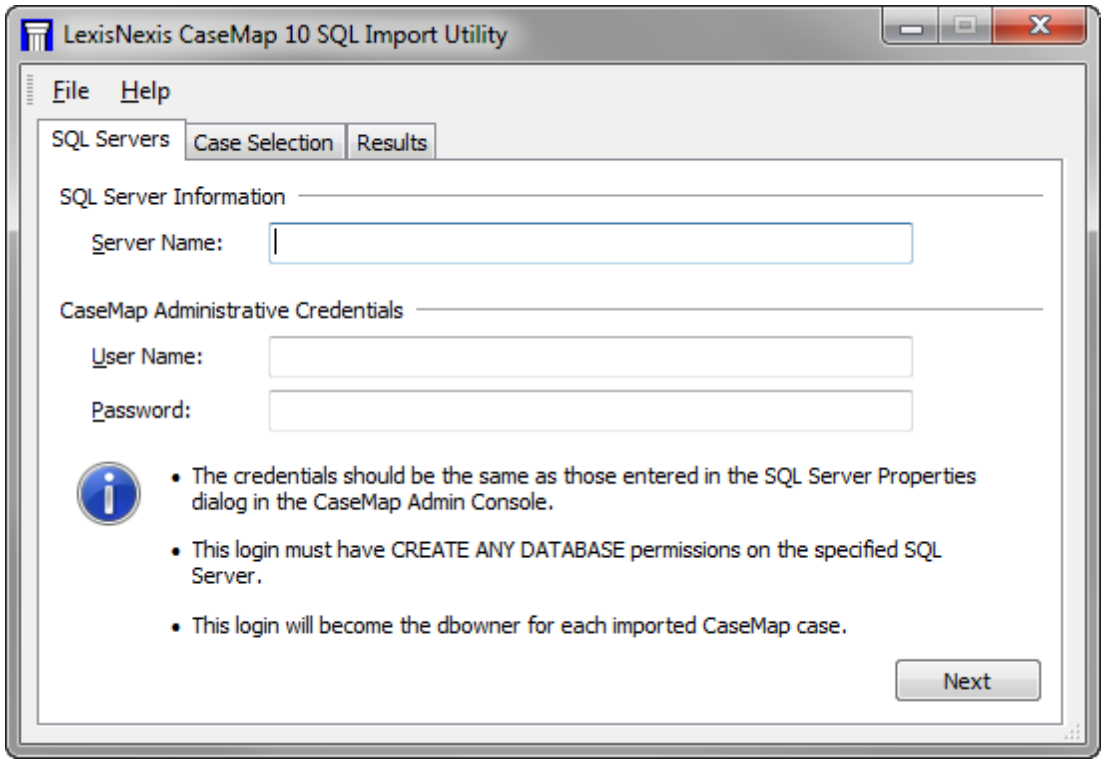
9. In the **Installshield Wizard Complete** dialog box, verify that the **Launch CaseMap SQL Import Utility** check box is selected.

© 2014 LexisNexis. All rights reserved.



10. Select the **View the ReadMe File** check box if you want to review the file at this time.
11. Click **Finish** to continue.
12. When the **CaseMap SQL Import Utility** launches, click **Close** at this time.

© 2014 LexisNexis. All rights reserved.



When you are ready to migrate existing cases to the CaseMap Server, the LexisNexis CaseMap SQL Import Utility dialog box displays. See About migrating cases.

Related Topics

About CaseMap Server
Installing CaseMap Server
About migrating cases
Registering existing SQL cases
Mapping case users

Testing installation

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

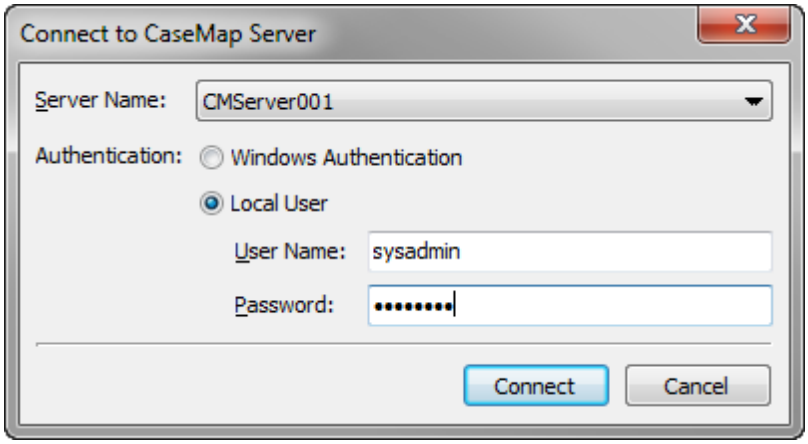
Testing installation involves:

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

© 2014 LexisNexis. All rights reserved.

To test connectivity in the CaseMap Administration Console

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



3. In the **Authentication** area, select the authentication method you want to use: **Windows Authentication** or **Local User**.

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

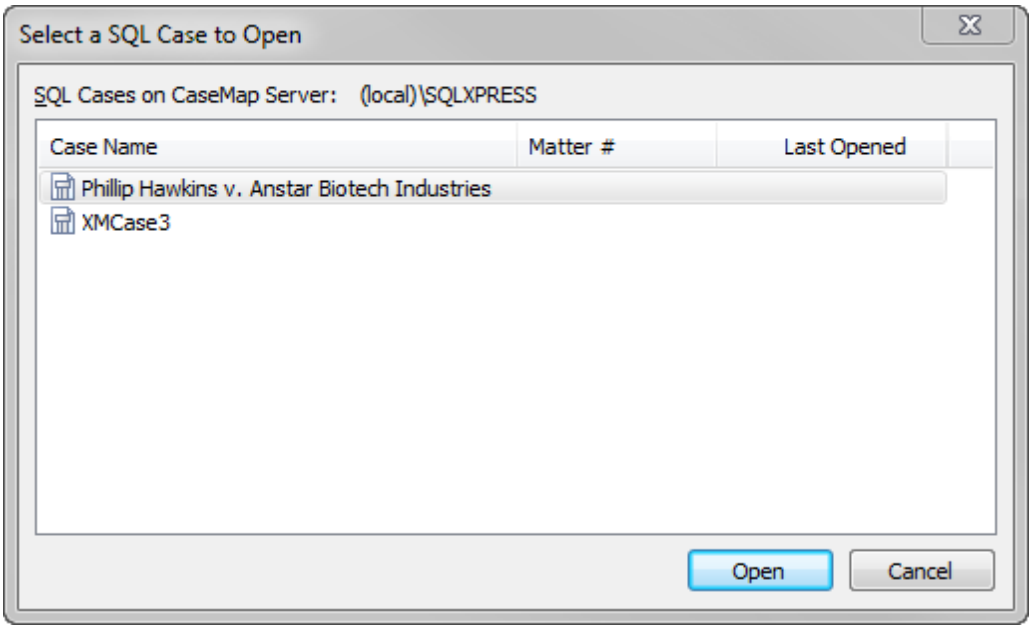
4. Click **Connect**.

   You can now view the CaseMap Admin Console where you can register and publish cases, add users, etc.

To open a SQL case file

1. Launch either **CaseMap** or **TextMap**.
2. On the **File** menu, click **Open SQL Case**.
3. In the **Select a SQL Case to Open** dialog box, select the SQL case you want to use, then click **Open**.

© 2014 LexisNexis. All rights reserved.



4. Verify that the case name displays in the upper left corner of application's title bar.
   - **CaseMap** — If you can view case records in spreadsheets and open an attached file, the installation was successful.
   - **TextMap** — If you can view transcripts and open an attached file, the installation was successful.

Related Topics

Verifying connectivity

Verifying connectivity

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

To verify connectivity

Checklist: Connectivity	
	Task
	Servers

© 2014 LexisNexis. All rights reserved.

Checklist: Connectivity

	Task
☐	Is CaseMap Server installed?
☐	Is the CaseMap Administration Console installed?
☐	Did you remember to set up an admin database and a valid system administrator account in SQL Management Studio first?
	Case Files
☐	Did you register your cases in the CaseMap Administration Console?
☐	Did you associate your cases to SQL Servers so that CaseMap/TextMap can access it?
☐	Have you implemented the necessary Web server address restrictions?
	Users
☐	Have you set up and enabled user accounts in the CaseMap Admin Console?
☐	Does each user have a valid user ID and password, and does it match for Active Directory?
☐	Have you assigned user accounts to roles and SQL cases?
☐	Do you have a CaseMap/TextMap license for each user who need to access cases?
☐	Have you installed CaseMap/TextMap locally for each user?

Related Topics

Testing installation

© 2014 LexisNexis. All rights reserved.

Index

- A -

authentication types
simple 5
Windows 5

- C -

CaseMap
command line parameters 29, 30
CaseMap Admin Console
installing 32
CaseMap Server 5
installing 18
CaseMap SQL Import Utility
installing 43
command line
CaseMap parameters 29, 30
opening CaseMap SQL cases 30
opening TextMap SQL cases 30
TextMap parameters 29, 30
configuring
SQL Server for Casemap Server 12
SQL Server for CaseMap templates 14
SQL Server Service Broker 13
WebConfig file 5
connectivity
verifying 52

- I -

installing
CaseMap Admin Console 32
CaseMap Server 18
CaseMap SQL Import Utility 43
testing 50
verifying connectivity 52

- L -

logon
automate CaseMap 29
automate TextMap 29

- S -

service broker
enabling in SQL Server 5
SQL Server
configuring for CaseMap Server 12
configuring for CaseMap templates 14
configuring Service Broker 13
enabling Service Broker 5
system requirements
CaseMap Server 5

- T -

templates
configuring SQL Server 14
testing
installation 50
TextMap
command line parameters 29, 30

- V -

verifying
connectivity 52

- W -

web servers
CaseMap Server 5
enable support for debugging 5
enable support for SSL 5

© 2014 LexisNexis. All rights reserved.