Installing TextMap
User Guide

TextMap®, Version 9.1

- **Preliminary Planning**
- **Installing TextMap**
- **Installing TextMap Binder Import Utility**

TextMap Installation Guide

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

Version: TextMap® 9.1
Release Date: February 28, 2017

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User Guide

Installing TextMap

Chapter

1

Installing TextMap

Preliminary Planning for TextMap

About preliminary planning

Preliminary planning for implementing any software application is important for achieving the best set-up results, the first time. We recommend that you take some time to review and plan how your organization will be using TextMap, especially if you are also installing the CaseMap Server and the CaseMap Admin Console. Planning ahead helps ensure that administrative tasks are minimized for initial setup and your long-term maintenance of the application and its companion products.

⊟ **Plan before you install TextMap**

Before installing TextMap and the CaseMap Server, the CaseMap Admin Console, we recommend you review the following checklist to ensure you have not missed any steps in planning details.

Best Practices: Preliminary Planning
System Requirements / Licensing
Review system requirements and licensing options
Network Directory Setup
Ensure TextMap users have full network access to case file directory folders where local cases are stored, or have SQL cases assigned to them in the CaseMap Admin Console
* TextMap does not support/encourage VPN access to network files, which can cause user access issues unless it is installed on CITRIX. Remote users need a replica copy of the case file installed on their hard drive.
Have preset directory folders for each client/matter
Server Setup and Security
Implement server firewalls
Set up TextMap security in TextMap and the CaseMap Admin Console using Windows or simple authentication
*We recommend that you use Windows authentication for SQL cases
Enable security and require logons for all TextMap cases
Implement password policies
Use private IP via VPN access
Receiving Data
Have a data collection and processing plan in place
Verify that file formats are recognized in TextMap
Have a directory location with subdirectories in a structure that prepares you

Best Practices: Preliminary Planning

for optimal organization of the various case files, video source files, reports, and backups for each

Managing Clients/Users

Inform users of training options, immediately

Identify any remote staff that may need access to case files on your network or require replicas of case files

Create emails for users that include their logon information and pertinent case or software instructions to get them started

Roles and Responsibilities

Ensure users understand the case file design and know how they will specifically use TextMap for transcript review

Ensure users understand timelines and processes required for managing TextMap case files

Clearly define roles and responsibilities among case and IT staff, etc.

Implement policies for who can and cannot create/modify case file databases, add/delete users/roles, or conduct other sensitive tasks

Reporting

Know what types of reports will be generated by users and how to print them

Security

Apply security to the network directory folders that contain case files, transcripts, videos, etc., to prevent others from viewing privileged content

Apply read-only rights to user roles, as appropriate

Ongoing Maintenance/Management

Have a dedicated admin machine for the sole purpose of managing TextMap case files on the CaseMap Server

Schedule maintenance windows to ensure that all users are out of case files

Have a quality control plan in place for administrative tasks like importing/exporting data and synchronizing case files

Migrating Case Files

Have a migration path for importing case files from previous TextMap versions

You should only migrate a case file to a CaseMap Server once

* If you experience an issue during the import, you can try migrating the case file again.

Each SQL case requires its own SQL database

*For more information, refer to the CaseMap Server documentation.

Backup/Data Recovery

Have a backup schedule in place

Best Practices: Preliminary Planning
Always back up .txmap local case files
Always back up .MDF & .LDF for SQL files
Always back up SQL case databases
Ensure your internal guidelines are in place for backup and data retrieval
Implement archiving and data destruction policies
Updating Considerations
A best practice is to always have the most recent version of TextMap and the CaseMap Server/CaseMap Admin Console installed
Ensure that you can update all users accessing a specific case at the same time
Quality Control
Have well-defined checklists/procedures in centrally available location
Ensure that hand-off processes are well-defined

⊟ **Determine a clear migration path for SQL cases**

If you are using CaseMap Server, a migration path for importing cases from previous TextMap versions is essential. You should only migrate a case to a CaseMap Server case once. If you experience an issue during the import, you can try migrating the case again. Each SQL case requires its own SQL database.

For more information, refer to the CaseMap Server documentation.

Related Topics

Before installation
TextMap system requirements

Before installation

Review the following information to understand the installation and implementation process. If you did not buy CaseMap Server, you only need to install or upgrade the TextMap client application.

Installing TextMap involves the following:

- TextMap client application installed on local machines

- CaseMap Server (optional, for clients who want to create SQL cases)
- CaseMap Admin Console (optional, for clients who want to create SQL cases)

Implementing TextMap can involve one or more of the following:

- Configuring SQL Server for CaseMap Server installation
- Creating network folders to store local case files or creating SQL servers and SQL cases in the CaseMap Admin Console
- Applying network folder and field level security for local cases in CaseMap or setting up users, roles, and permissions in the CaseMap Admin Console for SQL cases
- Assigning users to SQL case databases in the CaseMap Admin Console
- Creating network folders to store case transcripts and other related files (videos, etc.)

Learn how TextMap licensing works

The licensing options for TextMap include:

- **Single seat** — A lower cost option for clients
- **Multi-seat** — Allows for installation on both PCs and the application server
- **Enterprise** — Allows for 400+ users and includes discount options

Review the system requirements

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

Please keep informed of TextMap release updates and how they impact your system by checking our Web site at http://www.lexisnexis.com/casemap/textmap.aspx?content=downloads.

Store local cases on the network for staff access

Local cases should be stored on the network where all case users can access the file. Local cases should be stored by case name or matter, or according to your organization's internal guidelines. Most organizations have network directory design guidelines already in place for storing information in a consistent manner.

If there is no network setup or only one individual is using a case, the case can be stored locally on a user's hard drive. In this instance, nightly back-ups of the case should be made to a flash drive or portable hard drive. In this scenario, other users cannot access the case without using a replica copy. Synchronizing data with the primary case should then occur regularly.

> 📝 If you are planning to move a local case to a new directory location, and want to ensure that the it is still accessible to users, build a directory template structure that is easy to relocate.

Apply folder security to local cases to control access

Local case security is applied by controlling access to cases stored in directory folders on your LAN. Grant folder access to only those users working on a particular case. In this manner, you are preserving case integrity by preventing others from reviewing your case information and strategy.

□ **Set up users and assign cases/roles for access**

All users must be added to a case in order to access it within TextMap or be assigned to a TextMap SQL case in the CaseMap Admin Console. Having a TextMap license does not grant a user permission to open a case.

We also recommend that you require users to set passwords. Users can set and change their passwords at any time. If a user of a local case has forgotten a password, contact Technical Support to have it reset. If a user of a SQL case has forgotten a password, he or she should contact their case database administrator.

□ **Determine a clear migration path for cases**

If you are using CaseMap Server, a migration path for importing cases from previous TextMap versions is essential. You should only migrate a case to CaseMap Server once. If you experience an issue during the import, you can try migrating the case again. Each SQL case requires its own SQL database.

For more information, see the CaseMap Server Answer Center.

Related Topics

About preliminary planning

TextMap system requirements

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 TextMap recommendations.

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

📝 When setting up users for local cases, ensure that all 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 to access.

□ **TextMap Client Application v9.0**

TextMap must be installed and run on a local hard drive. TextMap cannot be run from a network server. TextMap case data files can be stored in a file on a network drive or in a Microsoft® SQL Server® database. You must be logged on with administration rights to install TextMap.

- 1 GHz or faster 32-bit (x86) or 64-bit (x64) processor
- 1 GB RAM (32-bit) or 2 GB RAM (64-bit)
- Approximately 200 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 2008 Server®

  Microsoft Windows 2012 Server®

  Microsoft Windows Vista®

  Microsoft Windows® 7

  Microsoft Windows® 8

  Microsoft Windows® 10

- Microsoft Internet Explorer® v6.0+ is required for Send to CaseMap functionality from within LexisNexis Web sites
- Microsoft MSXML v6.0 and above
- Microsoft .NET Framework 4.0 is required for full-text query parsing

📝 You can install the TextMap v9.0 client application to a desktop that already has previous versions of TextMap installed. It will not remove the prior version.

📝 When prompted to enter an URL for the CaseMap Server (optional), please enter URL ending with CMServerClient.svc. CaseMap Server is required to work with SQL cases.

Related Topics

About preliminary planning
Before installation

Installing TextMap

Installing TextMap

The TextMap client application is installed to the Microsoft® Windows® desktop of any TextMap user. If you are also installing CaseMap Server, the install utility will prompt you to enter the URL to the CaseMap Server. The URL should end with CMServerClient.svc.

TextMap installs as an unregistered trial copy. There is a 30-day grace period to use TextMap. Once the grace period expires, TextMap will no longer function. The unregistered copy of

TextMap works identically to the registered version. If you are reinstalling over a registered version of TextMap, you will not need to re-register.

TextMap client installation overview:
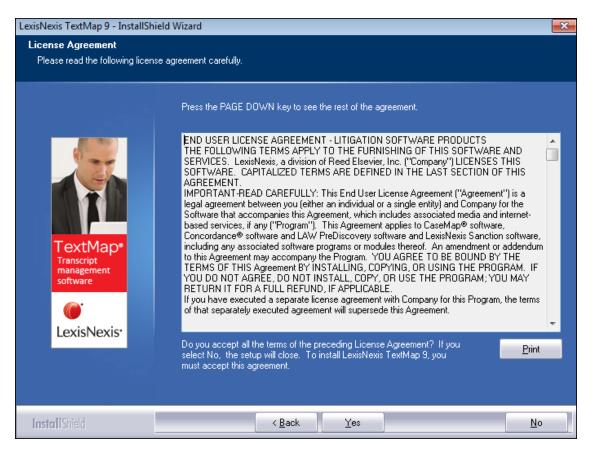
- TextMap must be installed and run on a local hard drive
- TextMap cannot be run from a network server
- You must be logged on with administration rights to install TextMap
- TextMap data files can be stored in a file on a network drive or in a Microsoft® SQL Server® database
- Previous version cases must be converted to open in the current TextMap version

⚠ Cases need to be converted to the current version format. Once a case is converted, users with previous TextMap versions cannot open. We recommend you upgrade all TextMap users working in the same case at the same time. For details, see Converting local cases.

📝 You can install the TextMap v9.0 client application to a desktop that already has previous versions of TextMap installed. It will not remove the prior version.

⊟ _To install TextMap

1. Double-click the **XM9Setup.exe** icon to launch the TextMap Install utility.

2. When the **InstallShield Wizard** launches, click **Next**.
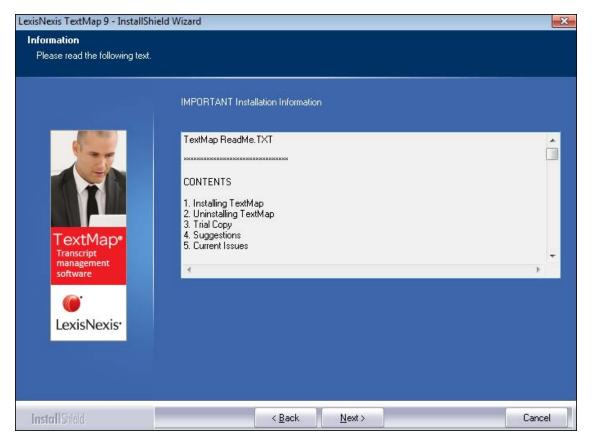
3. In the **License Agreement** dialog box, click **Yes**.

Click Print if you want to print a copy of the license agreement.
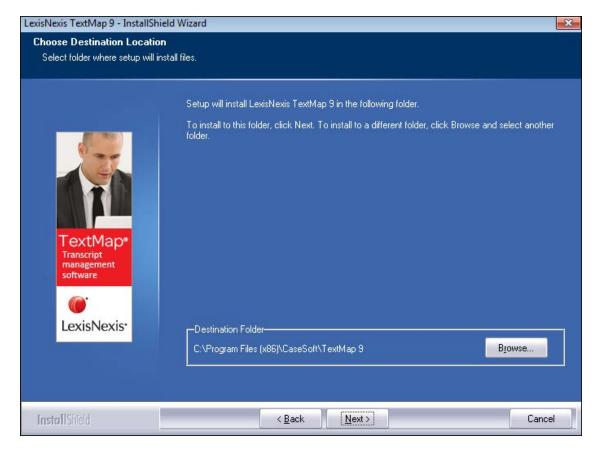
4. In the **Information** dialog box, review the installation information, and then click **Next**.

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

   This dialog box only displays if you are installing CaseMap Server with TextMap.

6. In the **URL** box, type the name of the Server URL, then click **Next**.

7. In the **Choose Destination Location** dialog box, verify whether the default destination folder is the appropriate location, and then click **Next**.
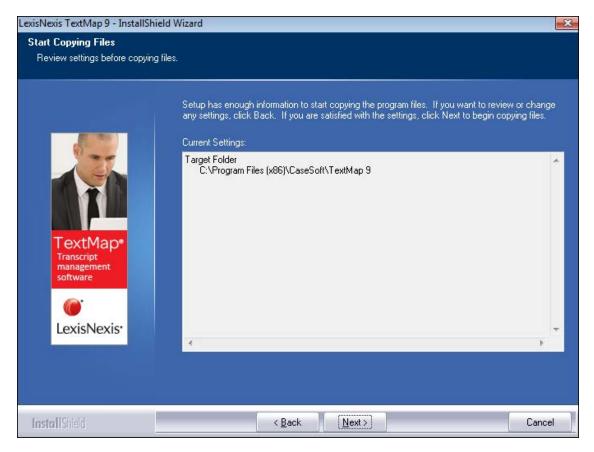
The default folder is C:\Program Files (x86)\CaseSoft\TextMap 9.

8. In the **Optional Components** dialog box, select the check boxes for the additional products you want to install.

9. For each product you want to install, click **View** to read the license agreement, select the check box to accept the terms of the license agreement, then click **Next**.

10. In the **Start Copying Files** dialog box, review the current settings, and then click **Next**.

11. In the **InstallShield Wizard Complete** dialog box, select the **Yes, I want to launch LexisNexis TextMap 9 now** check box, and then click **Finish**.

12. In the **Welcome to TextMap** dialog box, select the **Activate TextMap** option.

If you choose Run TextMap you will be running an unregistered copy of TextMap for a 30-day trial period.

13. Click the **Continue** button.

14. In the **TextMap 9 Software Activation** dialog box, click **Next** to open the **Enter your registration information** dialog box.

15. In the **Registration Name** box, type your user name for license registration.

16. In the **Registration ID** box, type your registration ID.

17. In the **Product ID** box, type the TextMap license number.

📝 You must be registered with LexisNexis as a valid user of this software to have this registration information. When you register with LexisNexis, you should receive this information via phone or email.

18. Click **Next** to continue.

19. 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.

```
TextMap 9 Software Activation                                    ✕

 Step 2. Read the LexisNexis License Agreement.

 END USER LICENSE AGREEMENT - LITIGATION SOFTWARE PRODUCTS      ▲
 THE FOLLOWING TERMS APPLY TO THE FURNISHING OF THIS SOFTWARE
 AND SERVICES.  LexisNexis, a division of Reed Elsevier, Inc. ("Company")
 LICENSES THIS SOFTWARE.  CAPITALIZED TERMS ARE DEFINED IN THE LAST
 SECTION OF THIS AGREEMENT.
 IMPORTANT-READ CAREFULLY: This End User License Agreement
 ("Agreement") is a legal agreement between you (either an individual or a
 single entity) and Company for the Software that accompanies this
 Agreement, which includes associated media and internet-based services, if
 any ("Program").  This Agreement applies to CaseMap® software,
 Concordance® software and LAW PreDiscovery software and LexisNexis
 Sanction software, including any associated software programs or modules
 thereof.  An amendment or addendum to this Agreement may accompany the
 Program.  YOU AGREE TO BE BOUND BY THE TERMS OF THIS Agreement BY ▼

 ☑ Yes, I will abide by the LexisNexis License Agreement.

                          [ < Back ]  [ Next > ]  [ Cancel ]
```

20. 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.

21. Click **Next**.

22. In the **Summary of online activation transmission information** dialog box, review the license registration information.

23. Click **Finish**.

24. In the message box confirming TextMap activation, click **OK**.

    The Installation is complete. TextMap now automatically launches and you can begin using.

Related Topics

About preliminary planning
Before installation
System Requirements
Registering the CaseMap Server in TextMap
Converting local cases
Updating TextMap versions

Registering the CaseMap Server

If you are using TextMap with CaseMap Server and did not register a server during TextMap

installation, you will need to register a CaseMap Server in the client application in order for users to access SQL cases in TextMap.

To register a CaseMap Server

1. Launch **TextMap**.

2. On the **File** menu, click **Options**.

3. In the **Options** dialog box, click the **CaseMap Servers** tab.

4. Click the **Add** button.

5. In the **New TextMap Server** dialog box, type in the client server address in the **Server Name** field.

6. In the **Server URL** field, type in the path to the server, then click **OK**.

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

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

The server you registered now displays in the Registered CaseMap Servers box.

<u>**To edit a CaseMap Server in TextMap**</u>

1. Launch **TextMap**.

2. On the **File** menu, click **Options**.

3. In the **Options** dialog box, click the **CaseMap Servers** tab.

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

5. Click the **Edit** button.

6. 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.

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

<u>**To remove a registered server in CaseMap**</u>

1. Launch **TextMap**.

2. On the **File** menu, click **Options**.

3. In the **Options** dialog box, click the **CaseMap Servers** tab.

4. In the **Registered CaseMap Servers** box, select the server you want to remove.

5. Click the **Remove** button.

    The selected server no longer displays in the Registered CaseMap Servers box.

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

To disable the Connect to CaseMap Server dialog box

You have the option to disable the Connect to CaseMap Server dialog box when you launch TextMap. This feature is turned on by default.

1. On the **File** menu, click **Options**.

2. On the **General** tab, clear the **Display Connect to CaseMap Server at start up** check box.

3. Click **OK**.

Related Topics

Installing TextMap
CaseMap Server Answer Center

Converting local cases

TextMap continues to allow you to convert previous version cases to the current release version. For example, you can upgrade a TextMap v8 case to a TextMap v9 case and have it still write to a Microsoft® Access database. Use the Import Local Cases utility in the CaseMap Server Admin Console to migrate local cases to the CaseMap Server.

When upgrading a previous version case to a new version, TextMap recognizes the older case file format, such as a TextMap v7.0 file (.txmap extension) and offers to convert it to the new version format for you. It only takes a minute or so to convert previous cases to the new TextMap format. All transcripts and highlights in the previous version case will be transferred into the current version case.

During the conversion process, TextMap does not change anything in your existing TextMap file. It creates a brand new case and copies all information from the old case into the new one. If a case already exists with the same name, an advisory to enter a new and unique name is issued. We recommend that you inform case staff when the conversion is complete and that the original case is now renamed. We also recommend that you update all users sharing a case to the current version at the same time.

> ✏ Previous versions of TextMap are not used during the conversion process, so you can uninstall them at any time.

⊟ Review case conversion considerations

Reference the following table for version-specific considerations when converting existing case files to a current TextMap version.

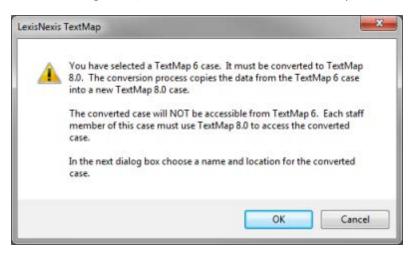| Case Conversion Considerations |
| --- |
| If you are sharing the case with others users and want them to have the latest TextMap features, each user must upgrade to the current TextMap version in order to use them. |
| Once case staff are added to a converted case (i.e., TextMap v9.0), the case is now only accessible to users with TextMap 9.0 licenses. |
| TextMap no longer supports converting TextMap v1.0 cases. If you need to convert a v1.0 case to the current TextMap version, we recommend that you convert the case to a previous TextMap version, and then convert it to the latest version of TextMap. |
| Earlier versions of TextMap can be converted to the .txmap TextMap file format. |
| Cases created with some earlier versions of TextMap (e.g., 2.0 - 4.0) are not compatible with the new features in later versions of TextMap. |

⊟ To convert a case to the latest version of TextMap

1. On the **File** menu, click **Open** and then select **Computer**.

2. Navigate to the directory/folder where the case is located and click to open it.

📝 You will be prompted to convert any case selected that is prior to the latest version of TextMap.

3. In the message box, click **OK** to start the conversion process.

4. In the **Select the name and location of the converted case file** dialog box, locate the directory where you want to save the case, then click **Save**.

5. In the message box confirming the case conversion, click **OK**.

📝 The message box displays the directory location of the original case and its new file extension.

The converted case now displays in the current version of TextMap.

Related Topics

Installing TextMap
Updating TextMap versions

Updating TextMap versions

When you receive notification that a current version of TextMap has an update available, you can quickly download it to ensure you have the latest tools and fixes needed for using TextMap successfully.

IT staff and litigation support professionals should alert users when they are eligible to receive a new version of TextMap for their licenses. The latest version can be downloaded at http://www.lexisnexis.com/casemap/textmap.aspx?content=downloads by following the instructions for installing TextMap.

Once you have updated TextMap, review the What's New topic for release information detailing feature enhancements for the version you are now using.

1. Verify that the computer you are using has an active Internet connection for the update.

2. Open **TextMap** on the desktop for the license holder needing the update.

3. On the **File** menu, click **Help & Info**, and then click **Update TextMap**.

4. In the **TextMap WebUpdate** dialog box, click **Continue**.

    A status screen displays the installation process for the update and then prompts you with the version installed when it completes.

    If you currently have all updates installed, you receive a message indicating that you have the current version.

Related Topics

Before installation
System Requirements
Installing TextMap

Installing the TextMap Binder Import Utility

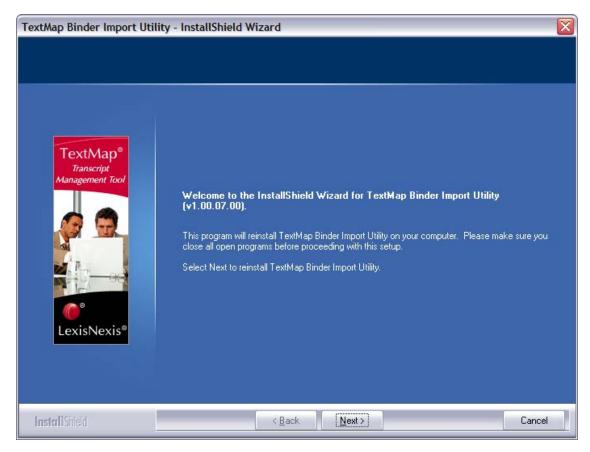## Installing the TextMap Binder Import Utility

The TextMap Binder Import Utility allows you to import binder projects and exhibits into a TextMap case file. The TextMap Binder Import Utility converts the binder case into a portable case format (.PCF file) that can be imported into your case.

Before installing the binder import utility, you will need to have the following software installed:

- TextMap v8.0
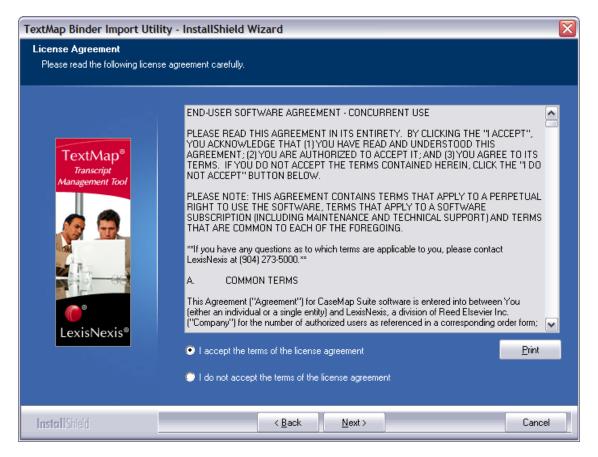- TextMap Binder Import Utility v1.0
- RealLegal Binder v7.5

1. Double-click on the **XMBinderImportSetup.exe** icon to launch the TextMap Binder Import utility.
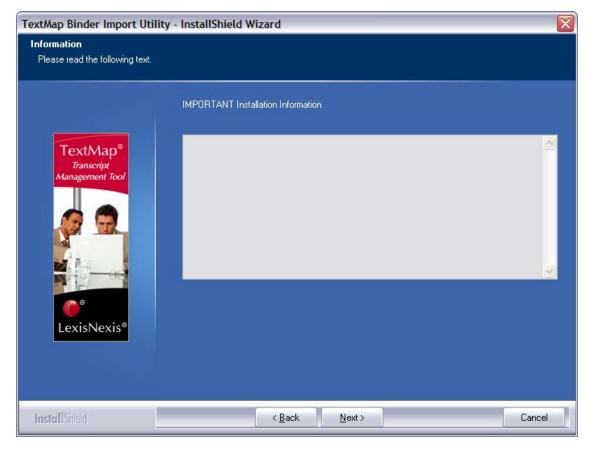
2. When the **InstallShield Wizard** launches, click **Next**.

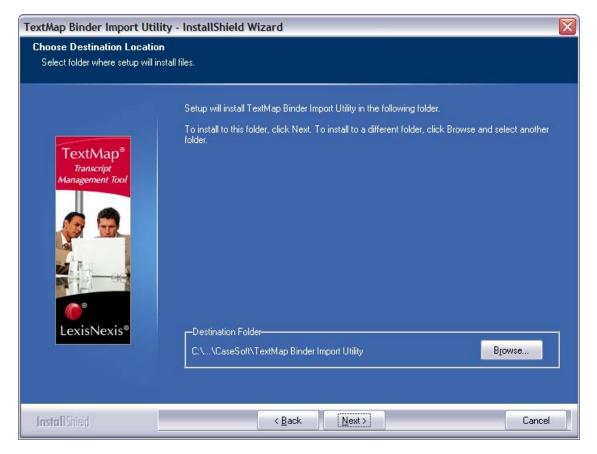3. In the **License Agreement** dialog box, click **I accept the terms of the license agreement**.

Click Print if you want to print a copy of the license agreement at this time.

4. Click **Next** to continue.

5. In the **Information** dialog box, review the installation information, then click **Next**.
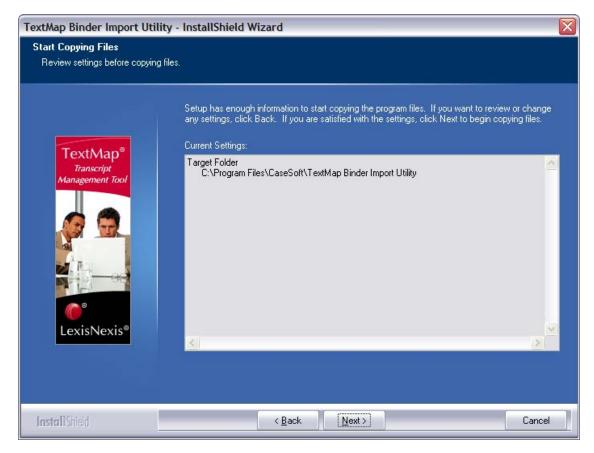
6. In the **Choose Destination Location** dialog box, click Browse to select the folder you want, then click **Next**.

The default folder is C:\CaseSoft\TextMap Binder Import Utility.

7. In the **Start Copying Files** dialog box, review the program files, then click **Next**.

8. In the **InstallShield Wizard Complete** dialog box, click **Launch TextMap Binder Import Utility** to automatically open the utility after installation completes.

9. Click **View the ReadMe File** if you want to read it at this time.

10. Click **Finish** to complete the installation.

    The TextMap Binder Import Utility dialog box displays.

You can now import a binder case into TextMap.

Related Topics

Importing binders

Importing binders

Using the TextMap Binder Import Utility, you can convert and import a binder case from RealLegal Binder directly into your TextMap case file along with any case exhibits (including linked exhibits) or synched video files. The utility supports importing one binder case at a time.

Once you have imported the binder case into TextMap, you can create a case file from it.

⊟ To import a binder case

1. Double-click on the **TextMap Binder Import Utility** icon to display the **TextMap Binder Import Utility** dialog box.

2. Next to the **Source Binder case** field, click **Browse** to navigate to the network folder where the binder file (.pxl) you want to import is stored.

3. In the **Select a Binder case** dialog box, click on the binder file you want to import, then click **Open**.

4. Next to the **Output TextMap case folder** field, click **Browse** to locate the network folder where you want to save the case file (.txmap).

5. In the **Browse For Folder** dialog box, locate the network folder you want to use, then click **OK**.

6. In the **Organization name** field, type in the name of your organization.

7. Select the **Index transcripts during import** check box if you want this option.

8. Click the **Import** button to import the file into your TextMap case.

9. In the message box verifying the import is complete, click **OK**.

   The imported case now displays in TextMap.

⊟ **To generate a .pcf file**

1. Double-click on the **TextMap Binder Import Utility** icon to display the **TextMap Binder Import Utility** dialog box.

2. Next to the **Source Binder** case field, click **Browse** to navigate to the network folder where the binder file (.pxl) you want to import is stored.

3. In the **Select a Binder case** dialog box, click on the binder file you want to import, then click **Open**.

4. In the **Output** area, click **Generate PCF**.

5. Next to the **PCF File** field, click the **Browse** button to navigate to the network folder where you want to save the converted binder case file (.pcf).

6. In the **File name** field, type in the name of the filed, then click **Save**.

7. Click the **Import** button to convert the binder case to the .pcf file format.

8. In the message box verifying the import is complete, click **OK**.

   You can now import the .pcf into TextMap and create a new case with it.

Related Topics

[Installing the TextMap Binder Import Utility](#)

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