

# Administering Sanction

## User Guide

Sanction®, Version 5.1

- **Managing Links to Cases**
- **Managing Case Tools and Options**
- **Managing File Locations**
- **Backing up and Restoring Data**
- **Managing Issues with Media Playback**

# Administering Sanction User Guide

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CaseMap®  
CaseMap® Server  
TextMap®  
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Sanction®

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# Administrating Sanction

User Guide

## Administrating Sanction

Chapter

1

## Administrating Sanction

### Managing Links to Cases

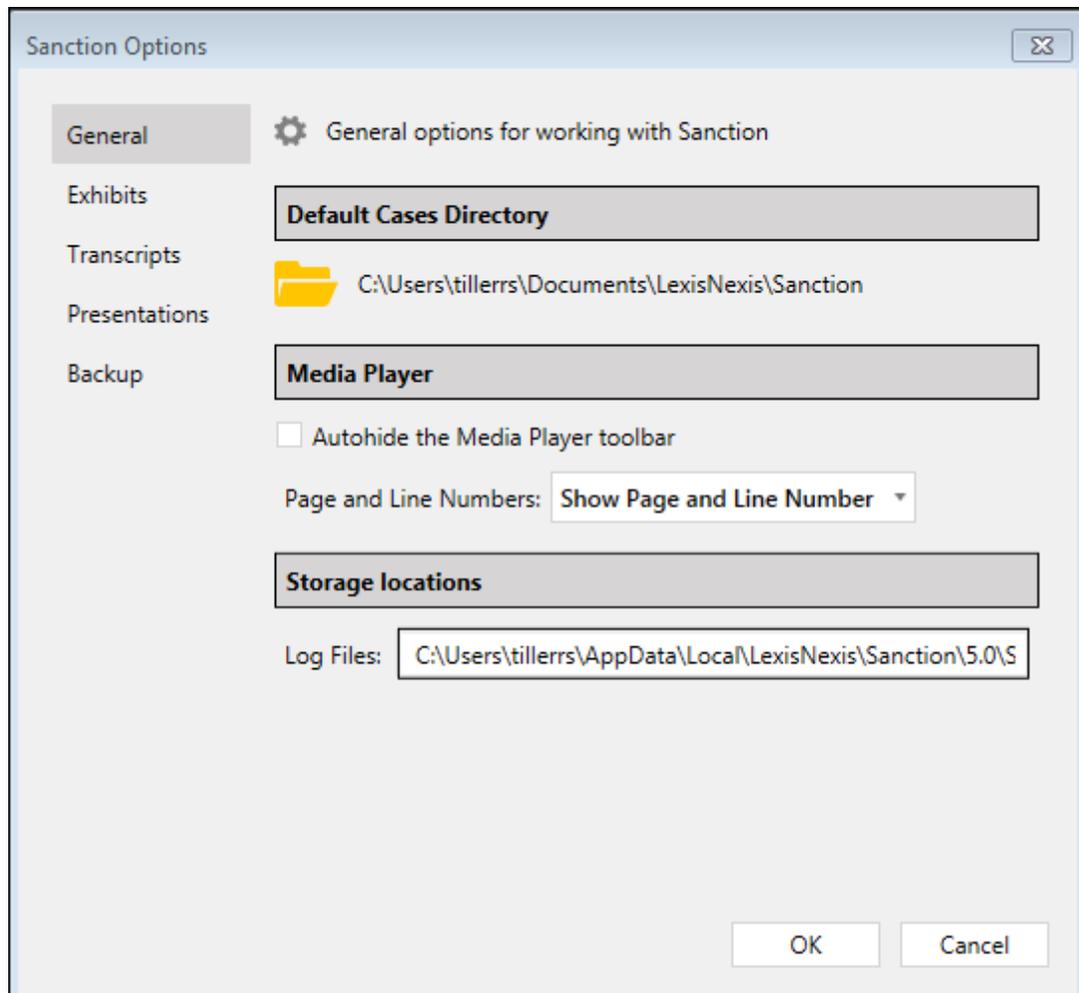
#### Change the Default Case Path

By default, Sanction saves cases in: C:\Users\*UserName*\My Documents\LexisNexis\Sanction, where *UserName* is the Windows user name of the current user.

You can reconfigure the default case folder so that when you open an existing case or create a new case, Sanction opens the folder path of your choosing. Many find it helpful to change the default folder to a shorter path, for example, to C:\Cases.

#### To change the default folder path for cases

1. On the FILE tab, click **Options**.
2. In the Default Cases Directory area, click the file path.



3. Navigate to the folder where you want to save your cases and then click **Select Folder**.

The default case folder location is changed to the new location.

- ⚠ We strongly recommend you set the default case path to a folder on your local computer, rather than to a network path or to a mapped network drive. Saving cases to a network can corrupt backup case files.

Related Topics

[Moving Cases and Media Files](#)

Configuring Preferred Media Paths

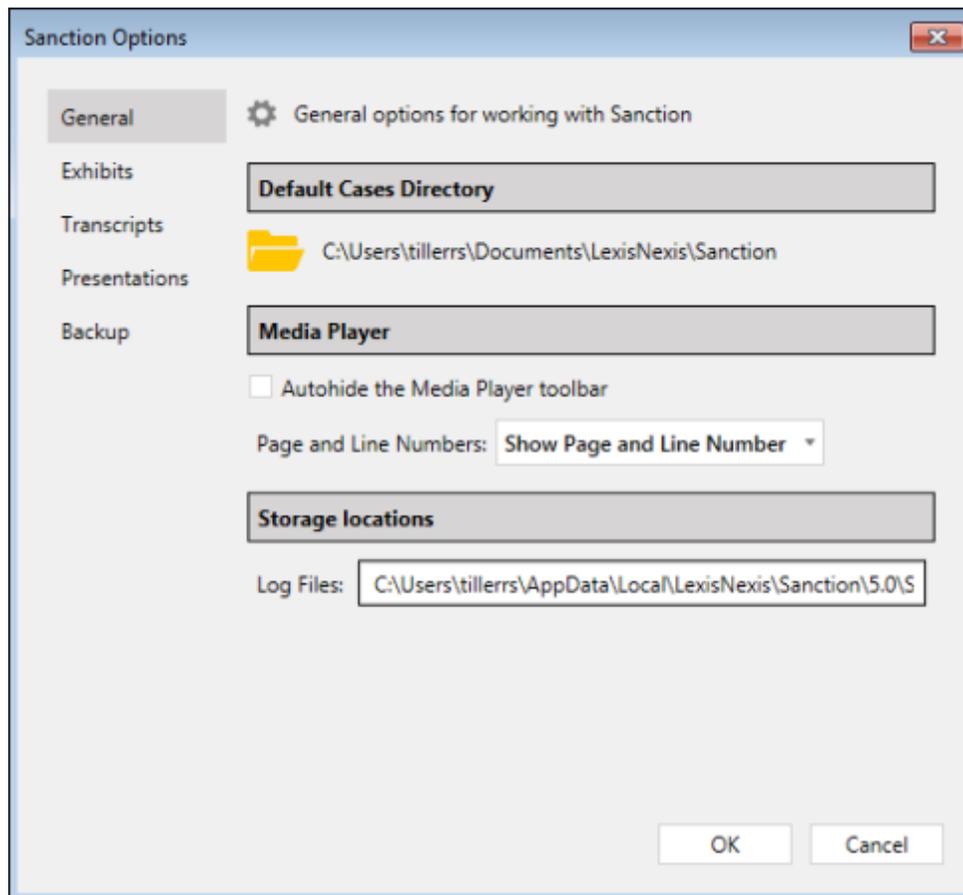
## ***Managing Case Tools and Options***

### **Customizing case options**

You can customize many of Sanction's features and standardize them according to any internal guidelines, case needs, or user preferences.

#### **To customize case options**

1. On the **File** menu, click **Options**.
2. Select the tab you need to adjust various custom settings.



Reference the Customizing Case Options table for setting details for each options tab.

3. Click **OK** to save any changes.

**To view the Case Options table**

Reference the following table for a complete listing of case options and their descriptions.

Case Options	
Tab	Settings
General	General options for working with Sanction. Set the default cases directory.
	Select/clear whether to Autohide the Media Player toolbar
	Adjust to Show Page and Line Number, Show Line Number Only, or Hide Page and Line Number in the Media Player.
	Set the storage location for the Log Files.

Case Options	
Tab	Settings
Exhibits	Change the settings for Exhibits in the case. Select the Default Image Tool for Images.
	Select the Font Settings for Annotations. Select the Size, Position, and Shape for Tear Out Options.
	Select the PDF Resolution Option.
	Change the settings for Transcripts. Select/clear whether to Display Time Stamp
Transcripts	Select the highlight color. Select the Font Settings for Transcript Text.
	Change the settings for Presentation Mode. Select options for the Display and Borders. Select/clear whether to Show Search Text Box Select/clear whether to Load First Item. Select Search By option.
	Select/clear to Autohide the Task Bar when not in use. Select/clear to Show Item Name on Task Bar. Select/clear to start playback when media item is selected. Select/clear to close item when media playback completes.
Presentations	Select the options and settings for Synchronized Text, Synchronized Text As Overlay or Hide Synchronized Text.
	Set Backup options. Set the Default Backup Location.
	Select/clear to save timing for automatic backups. Select/clear to Save on Close.
	Choose the Number of Backups to Save Per case. Choose the option to Delete, Undo Delete or Copy case to another

Case Options	
Tab	Settings
	location.

## Managing File Locations

### Move Cases and Media Files

This topic discusses procedures and considerations related to using the Windows® file system to move the actual source files of your case from one computer or device to another.

If you want information on moving case items within the Sanction program, see: [Moving Exhibits and Media](#). And for information about moving the folders you create within Sanction, see: [User Folders](#).

- ⚠ We strongly recommend you only work on case files housed on your local computer, rather than working on a case you access on a network. Working on cases located on a network can corrupt case backup files.

#### ☐ [How Sanction files are organized in the Windows® file system](#)

On the Windows® file system, a Sanction case consists of a case file, a case folder, a set of subfolders within the case folder, and the files for various items in the case, such as exhibits, media, and transcripts.

These are described as follows:

- **Case file.** The case name is the same as the file name. The file name ends with the .Ins3 extension.
- **Case folder.** Sanction creates a case folder with the same name as the case file, and in the same folder location as the case file.
- **Case subfolders.** When the case folder is initially created, it contains three subfolders: Exhibits, Transcripts, and Media.
  - **Exhibits** contains the exhibits you import the case, as well as screen captures, text clips, and video stills that you create while working in your case.
  - **Transcripts** contains the transcripts you import into the case. The textual part of a synchronized transcripts are also kept here but not the media. For more information on synchronized transcripts, see: [Synchronized Transcripts](#).
  - **Media** may contain some or all of the audio and video files for your case. When you import media into your case, Sanction just creates a link to the media file. Sanction does not copy the media to the case folder on the Windows file system, as it does when you import exhibits and transcripts.

☐ To move a case to a different folder on the same computer

1. Click the **FILE** tab.
  2. If the case you want to move is open then click **Close**.
  3. Click **Recent**.
  4. If the file you want to move is listed in the Recent Cases list, then right-click the case and then click **Remove from list**.
  5. Switch from Sanction to Windows Explorer.
  6. In Windows Explorer, open the folder that contains your case file (.Ins3) and folder. The case file and folder always have the same name.
  7. Use Windows Explorer to move the case file and folder to the destination folder.
- The moved case can be opened in Sanction.

☐ To move a case to a different computer

 If your case includes video files that are located outside of the Sanction case folder, consider running the Copy Video Files command prior to moving your case files. The Copy Video Files command copies video files to the \Media folder of your case.

For more information, see: Copy Video Files to the Case Media Folder.

1. Close Sanction.
2. In Windows Explorer, open the folder that contains your case file (.Ins3) and folder. The case file and folder always have the same name.  
  
By default, this folder for cases is: <User's Documents Folder>\LexisNexis\Sanction\. To learn more about viewing or changing the current location for cases, see: [Change the Default Case Path](#).
3. Use Windows Explorer to move or copy the case file and folder from the source computer to a removable drive and or other storage media.
4. Copy the case file and folder from the removable drive or transfer device to the destination computer. If the source and destination computer are networked, it may be possible to transfer the case file and folder across the network without a removable drive.
5. On the source computer, if any case media files for the case were stored outside of the case's Media folder, do the following:
  - Copy or move the media files from the source computer to a folder on the destination computer.
  - Update preferred media paths in the case as needed to reflect changed paths to the media. For more information on working with preferred media paths, see: Preferred Media Paths.

☐ Main considerations

When you move a case, remember these tips:

- Always keep the case file and the case folder together in the same folder.
- Do not change the name of the case file or the case folder.
- Do not change the contents of the case folder.
- For media stored outside of your case \Media folder, make sure to move it too. To help prevent video from being left on the source computer, you can run the Copy Video Files command prior to moving case files. For more information see: Copy Video Files to the Case Media Folder.
- If you choose not to copy the video and other media files to the \Media folder of your case, after the case is moved, make sure to register the new path to the media as a preferred media path. For more information, see: Preferred Media Paths.

#### Related Topics

[Change the Default Case Path](#)

Configuring Preferred Media Paths

Preferred Media Paths

Copy Video Files to the Case Media Folder

## Moving Exhibits and Media

You can move exhibits and media items along with associated clips from one Sanction folder to another.

 This topic applies to moving items between Sanction folders. To learn about moving the files for a case on the Windows file system, see: [Moving Cases and Media Files](#).

### [To move exhibits or media items](#)

1. Click the **Exhibits** or the **Media** navigation bar, depending on which type of item you want to move.
2. Select one or more items and then do one of the following:
  - On the HOME tab, click **Move**.
  - Right-click the items and then click **Move**.
  - Press **Ctrl+Shift+F2**.
3. Select the destination folder and then click **OK**.

 Individual pages and images of an exhibit cannot be moved independent of the exhibit itself. The entire exhibit must be moved.

#### Related Topics

[Moving Cases and Media Files](#)

User Folders

Deleting Items

## ***Backing Up and Restoring Data***

### **About backups**

Case data is valuable and performing regular backups ensures that your data is safe and retrievable in case of an emergent event.

When you open your case file, Sanction creates a backup so that if your case file is accidentally deleted or becomes corrupt, you can continue working on the case by using the backup copy. The backup case file is saved alongside the case file in the same folder.

The backup copy is named the same as the case file, but with the hour and minute of the last backup, formatted as *.MMDDYYYY*, appended to the case name. For example, a case named *Hawkins V Anstar.Ins5* might have a backup file named *Hawkins V Anstar.02282018.\_1020.bak*.

Note that only the case file itself is backed up in this way; exhibit files, transcripts, and media elements of the case are not backed up.

Backup settings are set in Sanction Options. See [Customizing case options](#) for more information.

- ⚠ To restore your case from the backup file it is critical that you rename the backup file to the same name as the original case file. Then you can restart the case using the renamed backup file. If you open the backup file without renaming it first, Sanction will be unable to establish links to the case items.

#### Related Topics

[Backing up a case file](#)

[Restoring case data](#)

[Backup best practices](#)

### **Backing up a case file**

Sanction provides a way to create, manage and restore multiple backup files to back up your case for data protection.

This feature allows trial technicians to have multiple backups with several available options in case of corruption and helps prevent data loss.

Sanction offers the following options to back up your case:

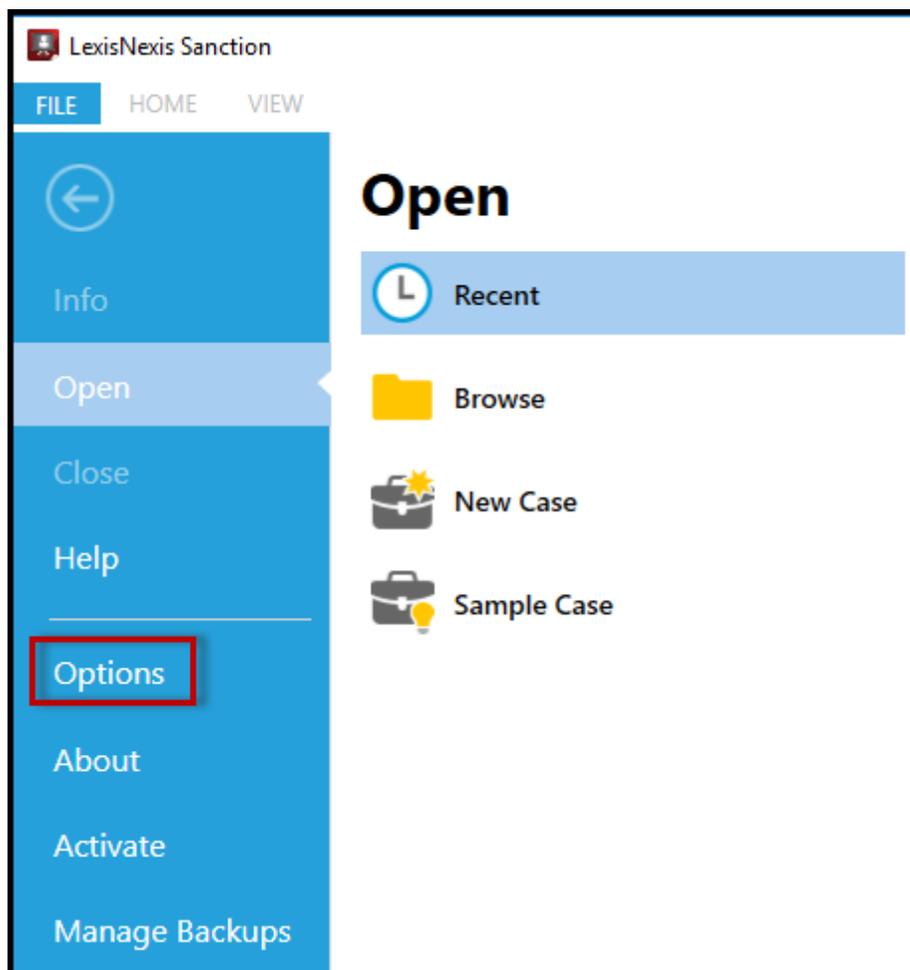
- Create a default backup directory

- Set the timing for automatic backup of files
- Designate the number of backup files
- Delete backup files
- Undo/recover last deleted backup
- Copy backup files to a new location

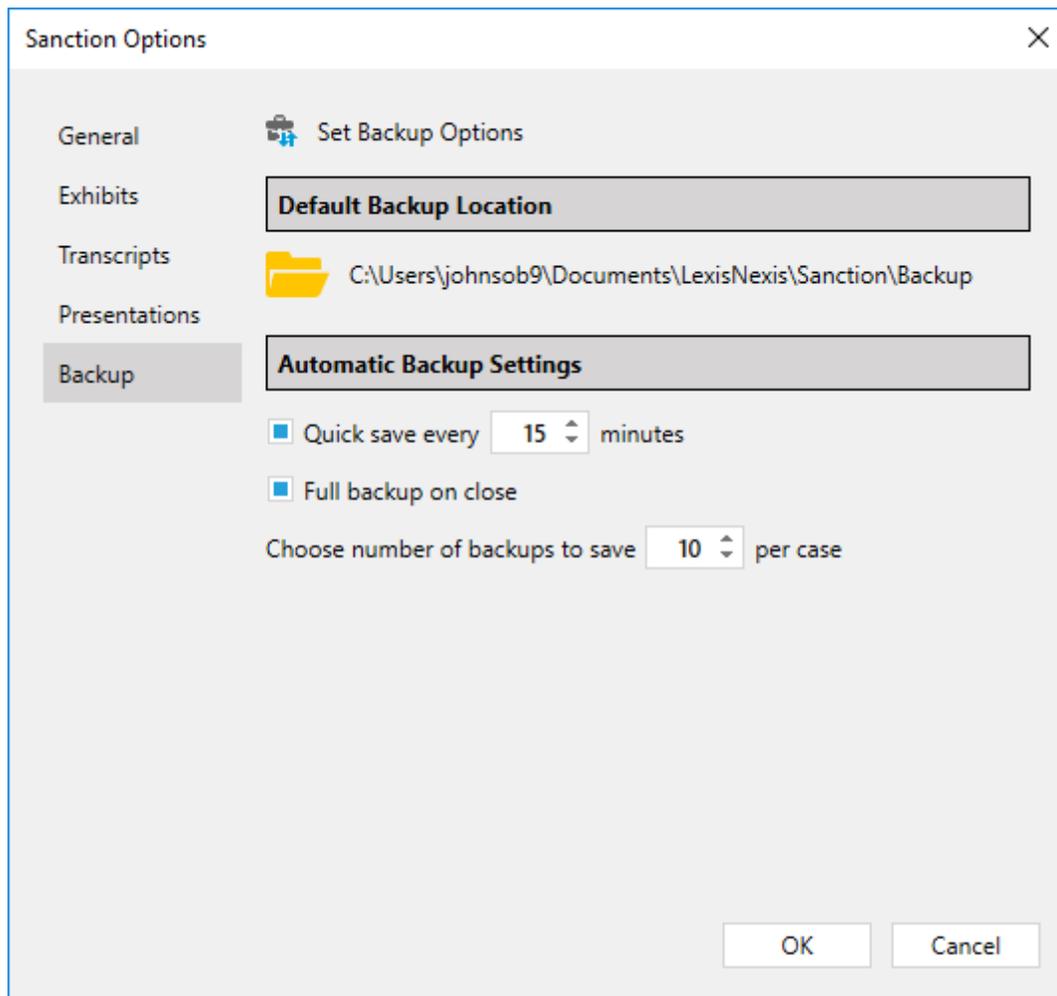
✔ When you create a backup directory, it should contain the same name as the Case Name.

#### To back up a case file

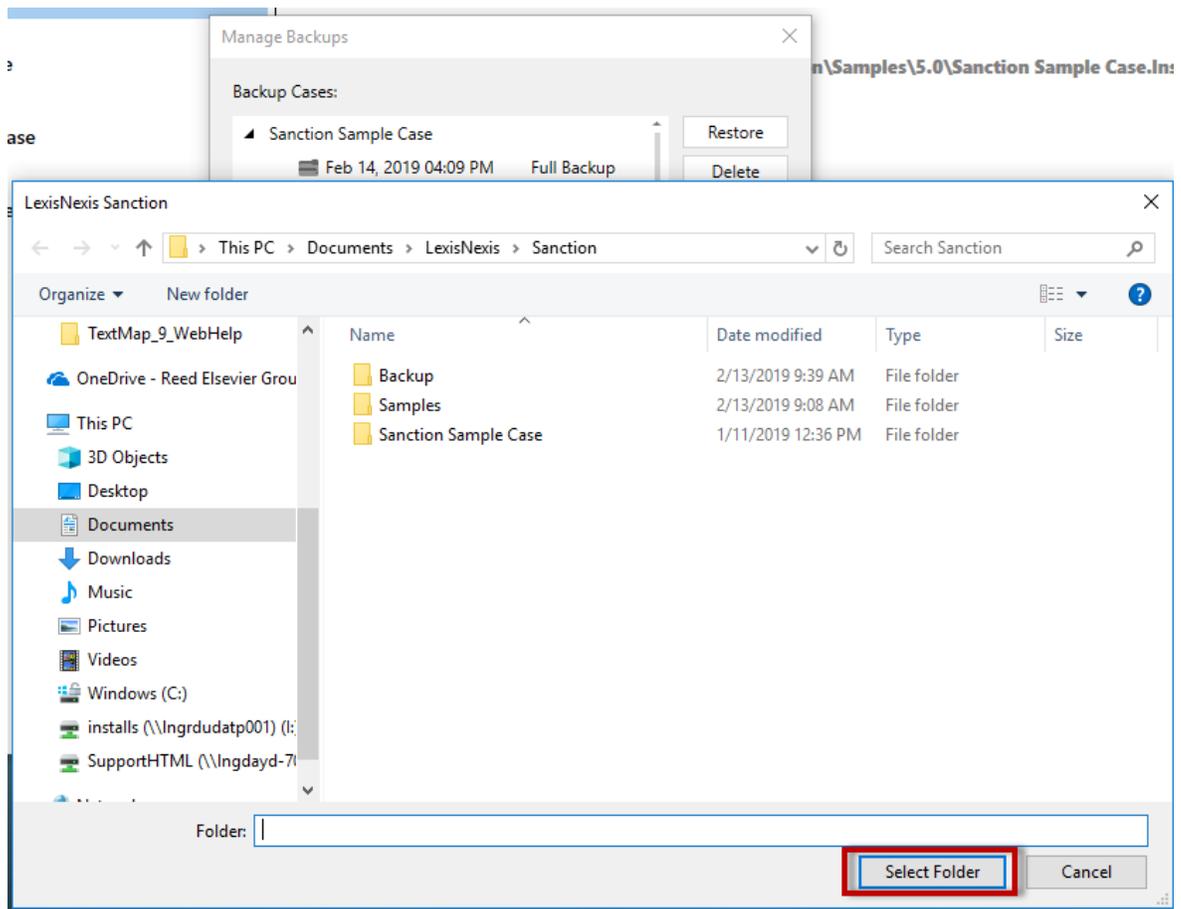
1. Click **File** and then click **Options**. The **Sanction Options** dialog box appears.



2. Click **Backup** to show the **Set Backup Options**.

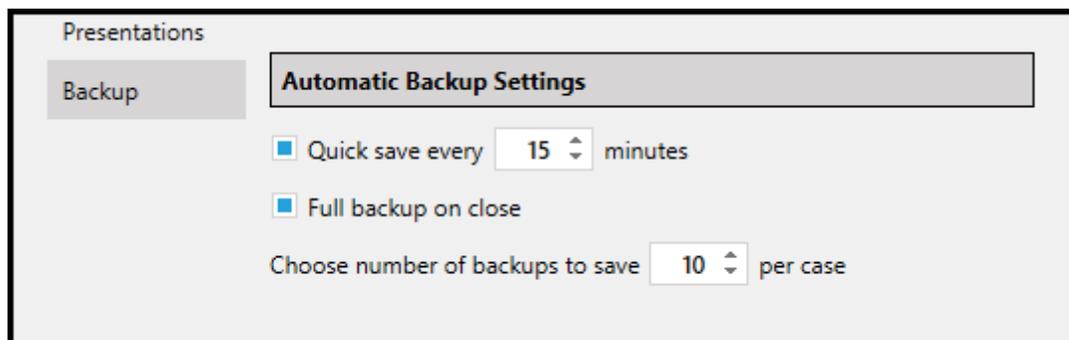


3. In the **Default Backup Location** area, click the file path to set the path for the folder where you want to store the backup cases. Browse to the location to save the cases and then click **Select Folder** to save the changes.



4. In the **Automatic Backup Settings** area do the following:
  - Select the box to adjust the minutes to set the timing for automatic back up.
  - Select the **Save on Close** box to activate the settings upon closing.
  - Adjust the number of backups to save per case.

The default number of backups is set to 10.



 The counter can be set for a minimum of 15 minutes and a maximum of 4 hours.

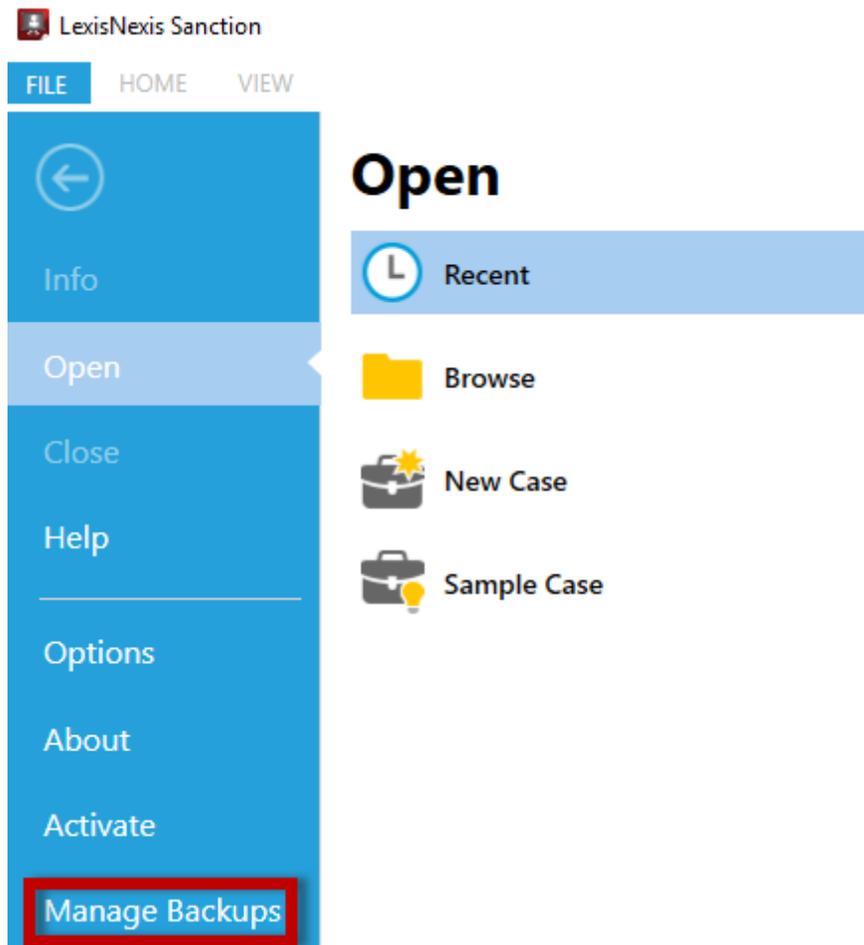
 The minimum number of backups per case is 1 and the maximum is 100.

5. Click **OK** to close the dialog box.

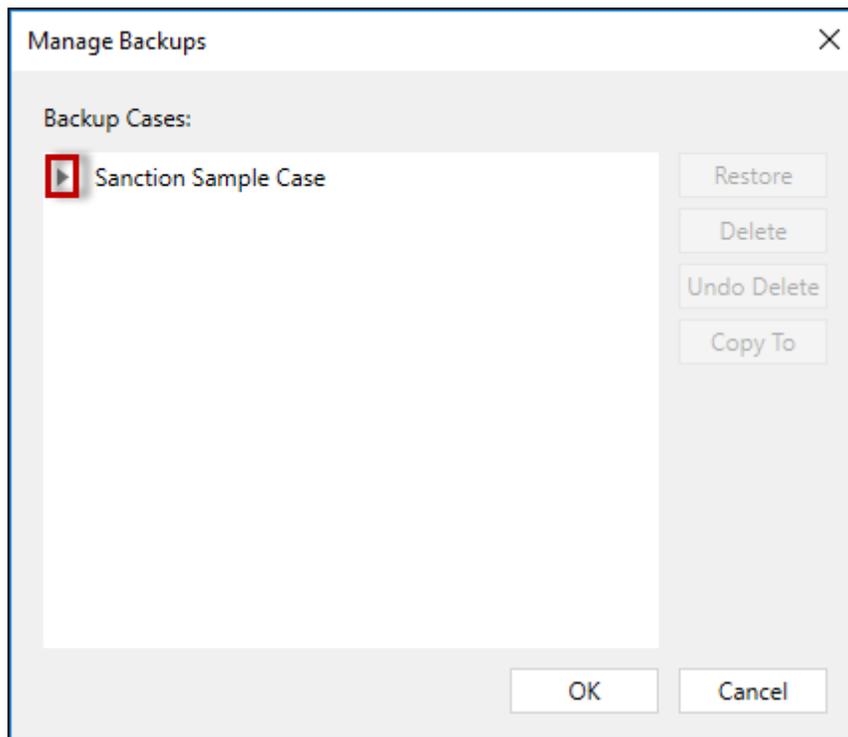
 To delete backup files

You can delete backup files from your backup folder to manage and keep your storage location organized.

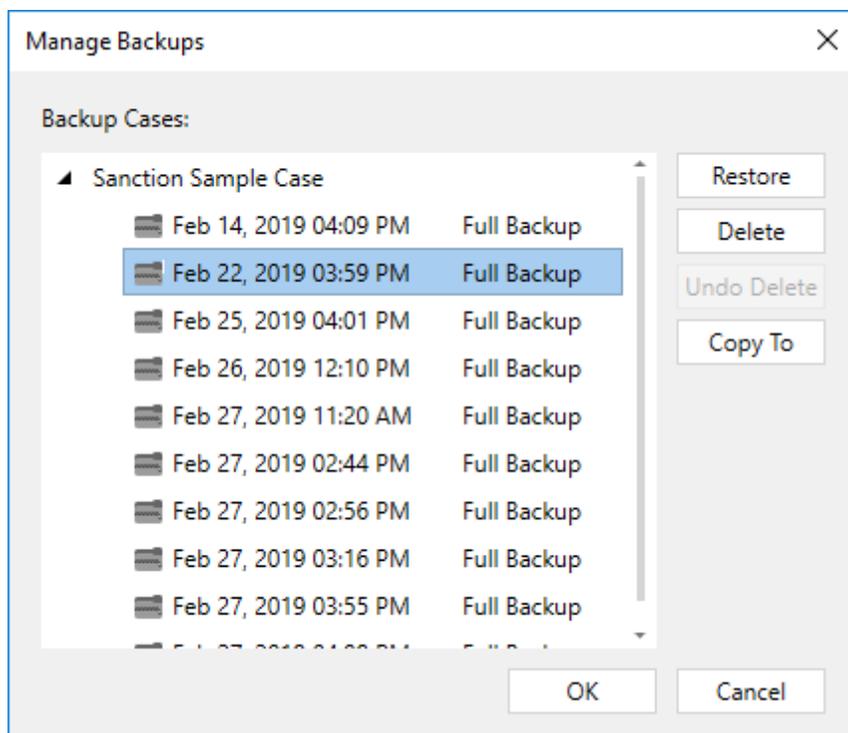
1. Click **File** and then click **Manage Backups**. The **Manage Backups** dialog box appears.



2. The **Manage Backups** dialog box appears. Click the arrow beside the case name to view the list of backups.



3. Click the backup copy (or copies) that you want to delete.



4. Click **Delete** to delete the backup.

5. Click **OK** to delete the case and close the dialog box.

The backup is removed from the backup folder permanently once you click **OK**.

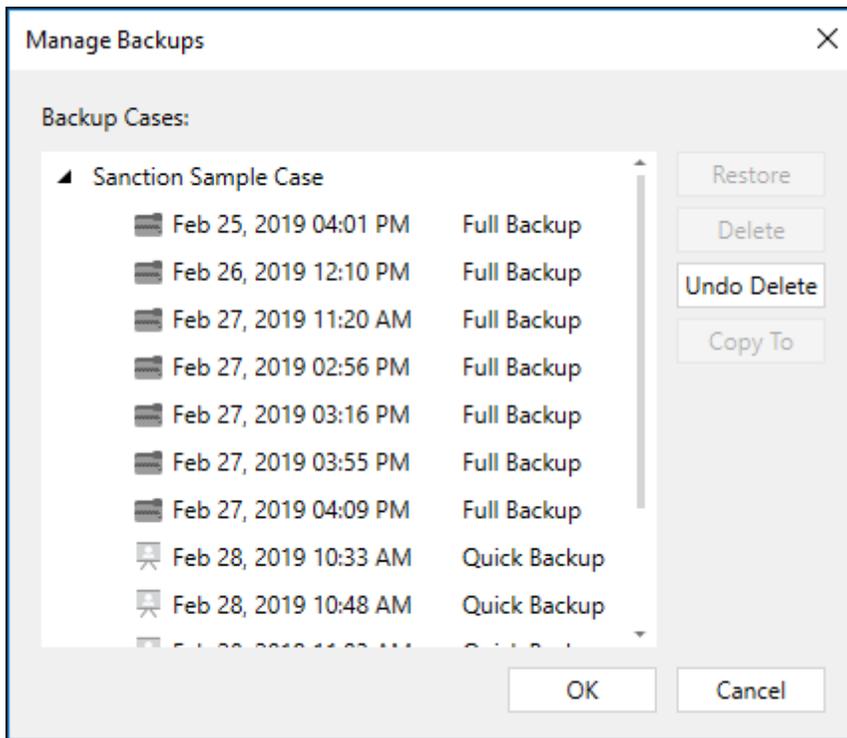
 The backup is not deleted if you click cancel. It will still appear in the list.

 **To undo/recover last deleted backup**

You can recover your most recently deleted backup. This allows a simple way to undo the last action to a backup that has been mistakenly deleted.

Files will be restored to the original backup location.

1. After following the steps to delete a backup, the **Undo Delete** button is active. Click **Undo Delete** to restore the deleted backup.



 If multiple files were deleted, they will all be restored to the original backup location.

2. Click **OK**.

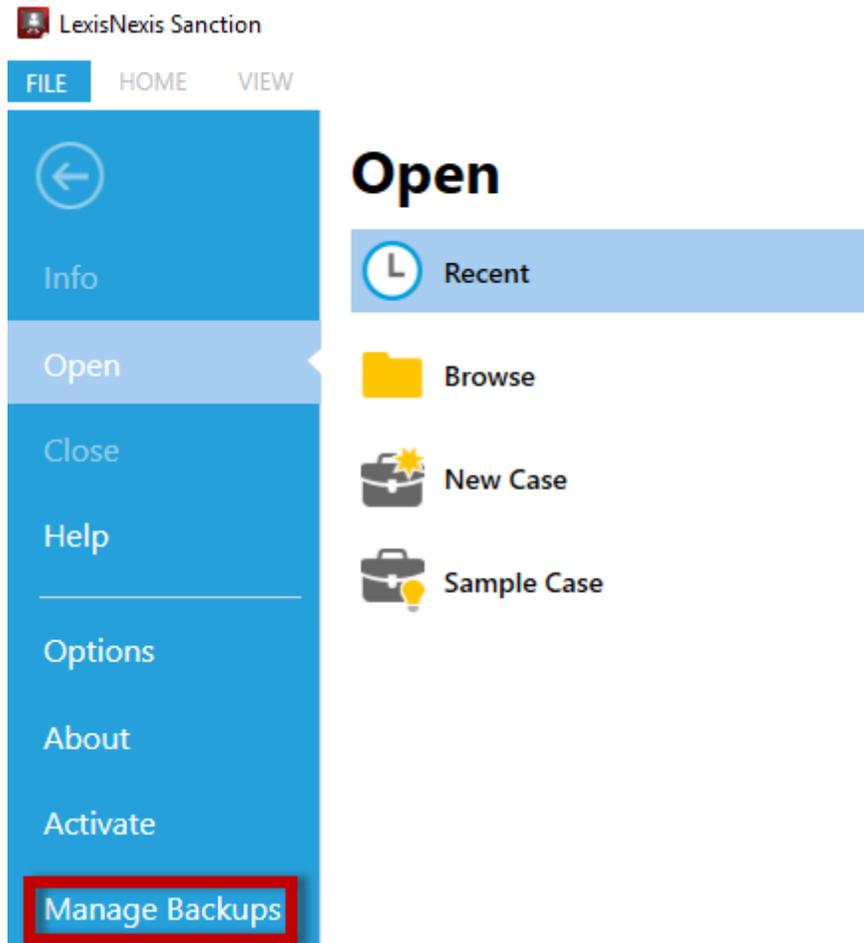
 After clicking **OK** and the dialog box is closed, the backup files cannot be restored.

 **To copy files to a new location**

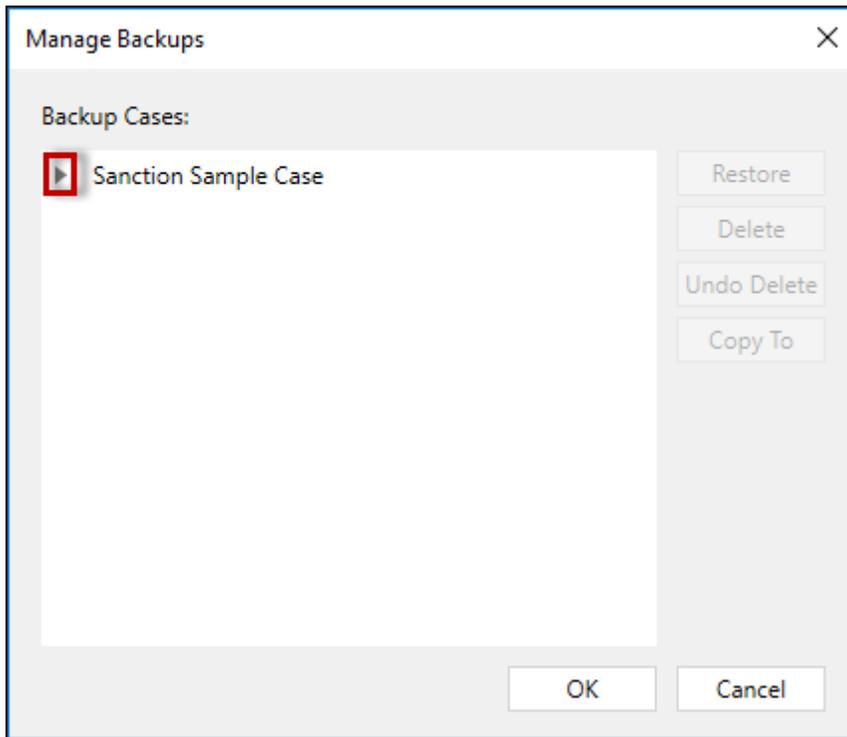
You can choose additional storage locations for each case's backup files to manage and keep your storage location organized.

This allows you to save a previously created backup to a new location.

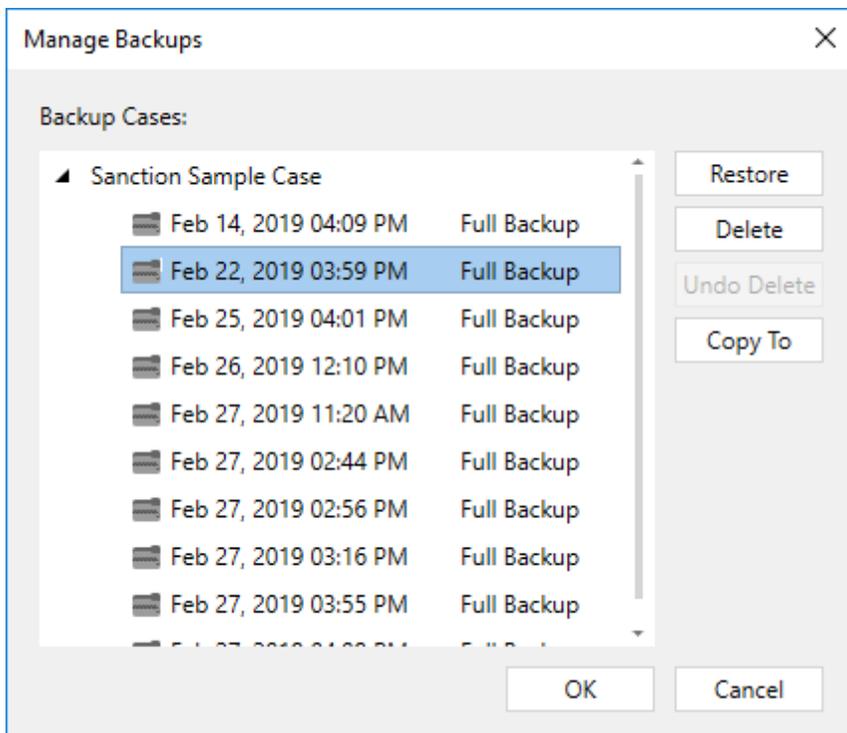
1. Click **File** and then click **Manage Backups**.



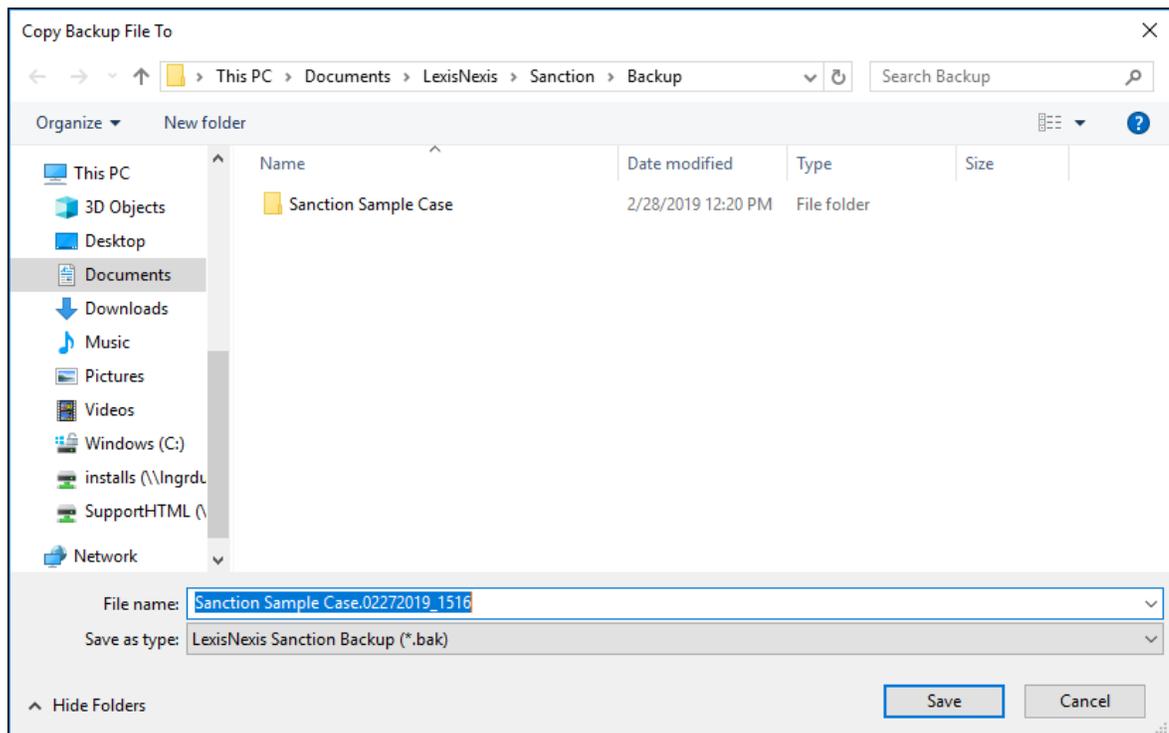
2. The **Manage Backups** dialog box appears. Click the arrow beside the case name to view the list of backups.



3. Click the backup copy (or copies) that you want to duplicate.



4. The **Copy Backup File To** dialog box appears for you to save the copies in the location of your choice.



5. In the **File name** field, you can rename the file name or keep it the same as it was previously.
6. Click **Save** to save the backup file to the new location.

#### Related Topics

- [About backups](#)
- [Restoring case data](#)
- [Backup best practices](#)

## Restoring case data

Sanction's Restore feature allows you to restore case data from designated backups. This allows you to easily recover data from a specific point in time.

### To restore your case from an automatic backup file

1. From the **File** menu, click **Options** to open the **Sanction Options** dialog box.
2. Click **Backup**.
3. Click the arrow beside the case name to view the list of backups and then click the backup copy that you want to restore.

4. Click **Restore**.
5. Browse to the location where the case is stored and select the asset folder that contains the case.

The default location for new cases is the UserProfile\Documents\LexisNexis\Sanction.

 If you have not set up your case in a different location than the default folder, select the Sanction folder. The .Ins5 is not visible.

6. Click **Select Folder**.
7. In the warning message dialog box to overwrite the current project, click **Yes** to continue.

The case is restored from the automatic backup file.

#### Related Topics

- [About backups](#)
- [Backing up a case file](#)
- [Backup best practices](#)

## Backup best practices

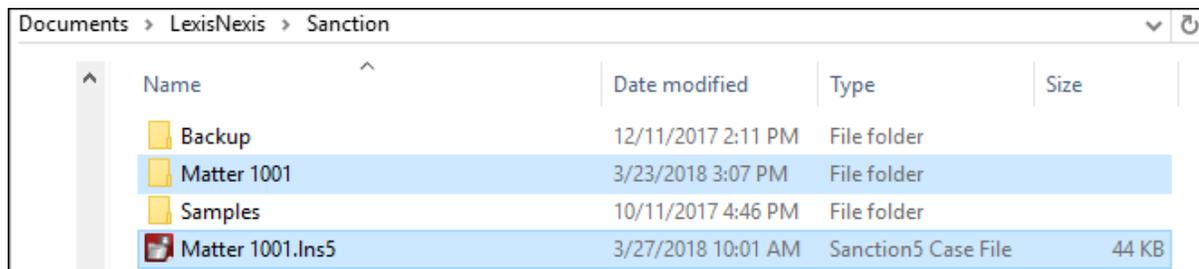
The Sanction automatic backup is designed to create a backup of the XML file for your case.

If you want a "snapshot in time" style backup with all associated exhibits and files, you will need to manually save the case directory.

Note the following:

Sanction has the ability to open and reference all data files with the .Ins5 file and data directory contained in the same location.

- By default, the data files for a Sanction case are stored in UserProfile\Documents\LexisNexis\Sanction
- To make a complete backup of the XML and data files, select the .Ins5 file and the folder with the same case name and archive them together



Name	Date modified	Type	Size
Backup	12/11/2017 2:11 PM	File folder	
Matter 1001	3/23/2018 3:07 PM	File folder	
Samples	10/11/2017 4:46 PM	File folder	
Matter 1001.Ins5	3/27/2018 10:01 AM	Sanction5 Case File	44 KB

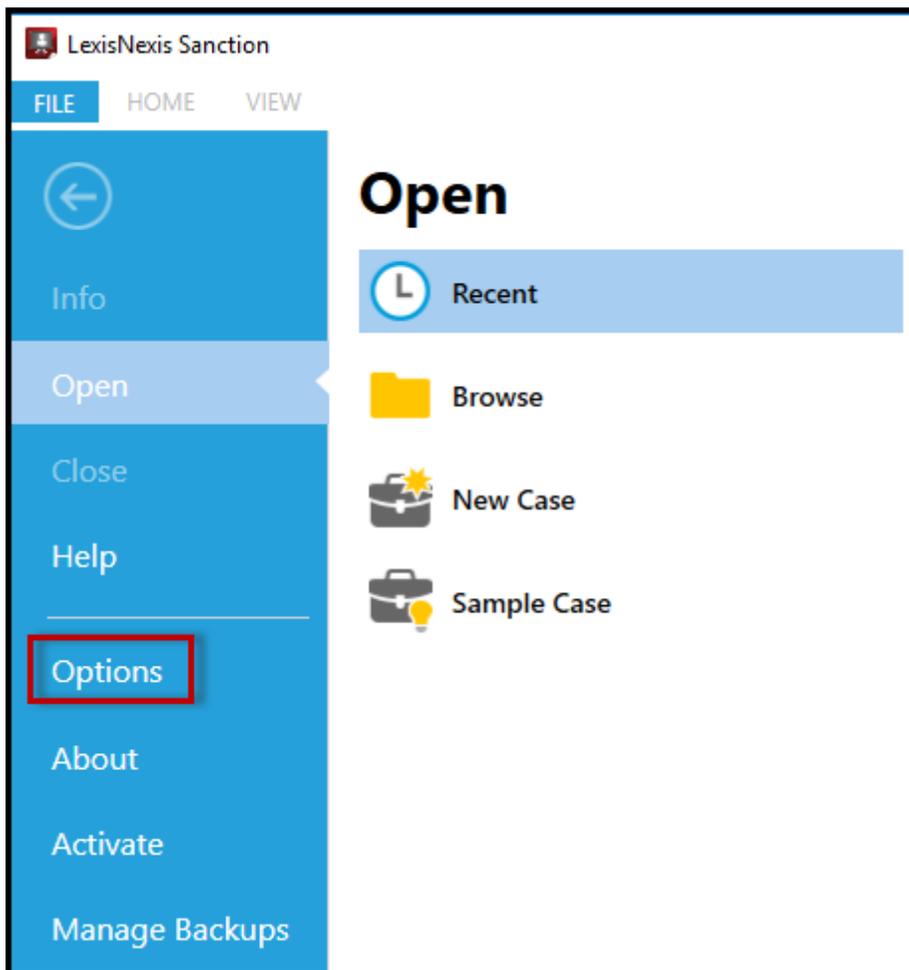
- Archive your case with a program such as WinZip or by copying all files to a backup location of your choice.

⚠ Check with your network administrator regarding any network policies.

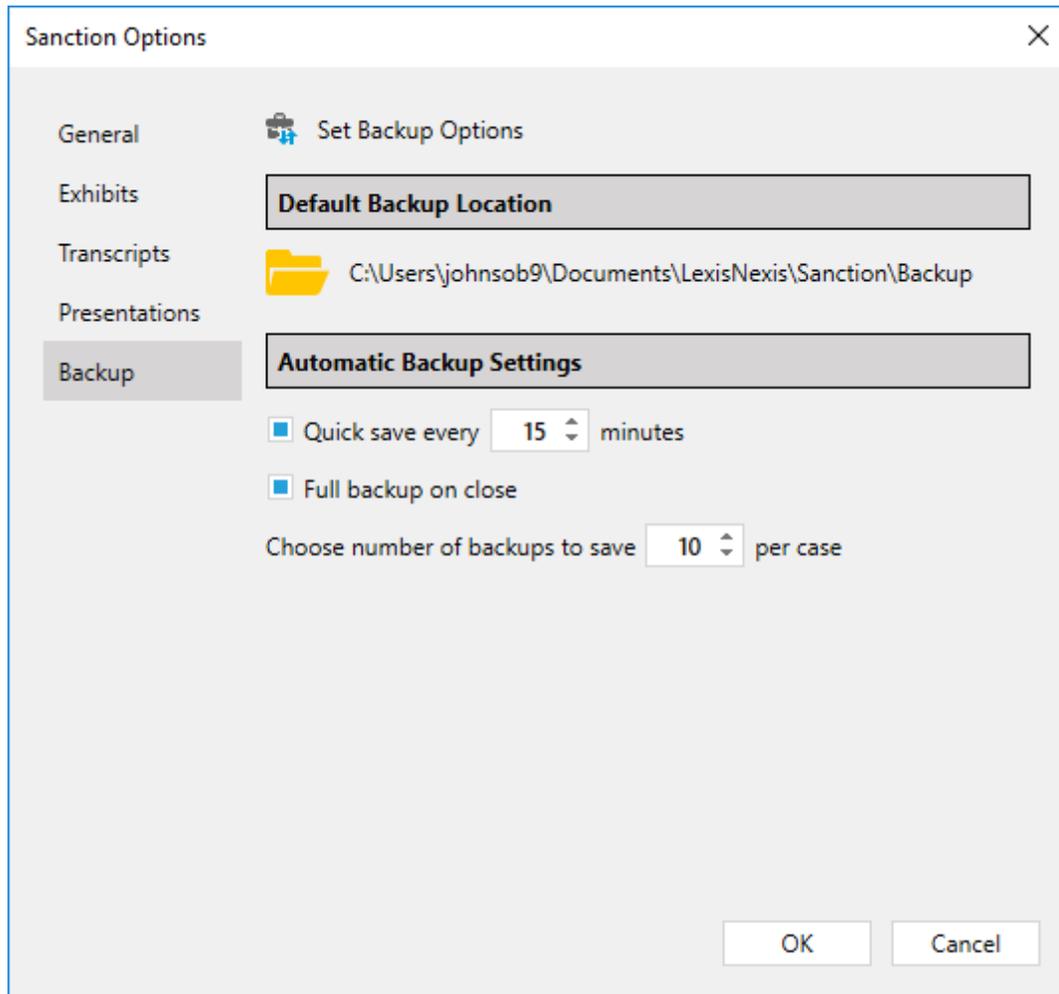
For more information on the automatic built-in backup and restore feature, see [Backing up a case file](#).

**To quick save a case file**

1. Click **File** and then click **Options** to open the **Sanction Options** dialog box.

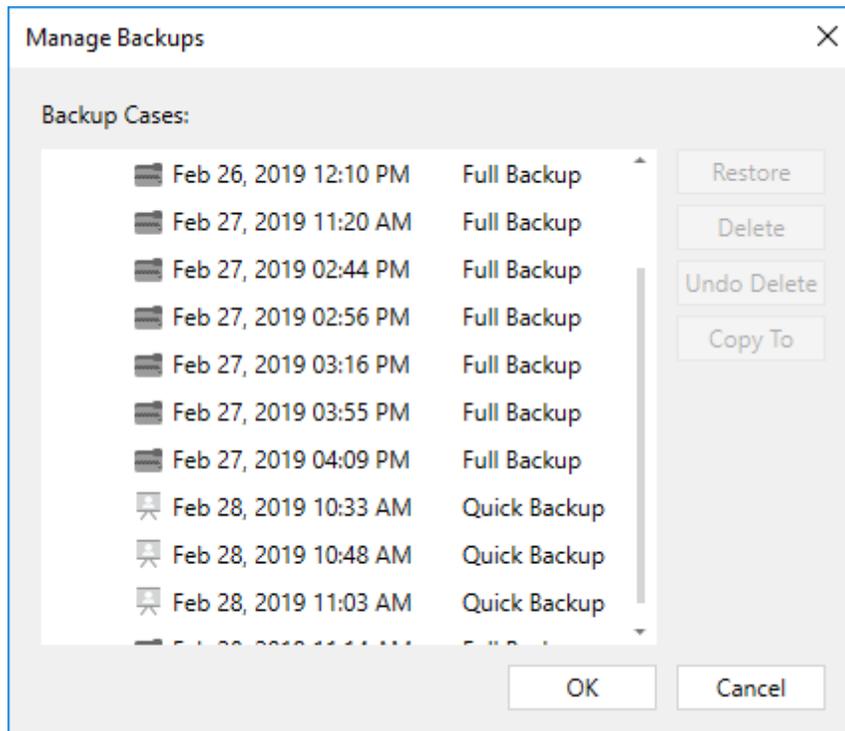


2. Click **Backup** to review the **Set Backup Options**.



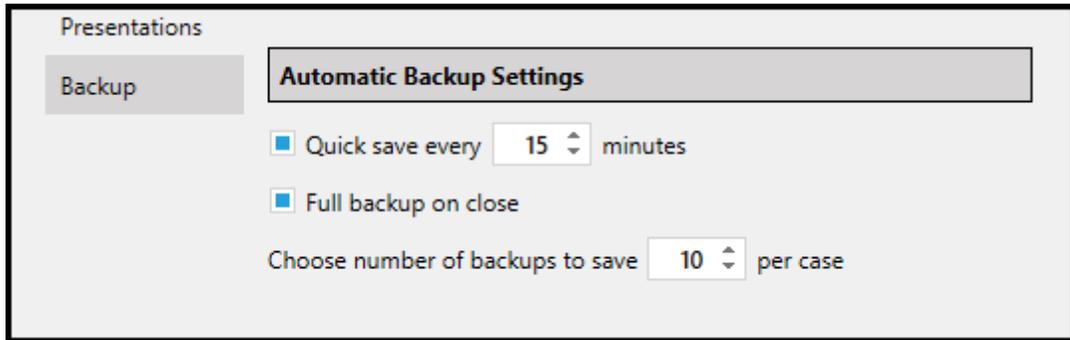
3. In **Default Backup Location**, click the file path to set the path for the folder where you want to store the backup cases. Browse to the location to save the cases and then click **Select Folder** to save the changes.
4. In **Automatic Backup Settings** do the following:
  - Check the box to set the timing for automatic back up. (**Quick save every \_\_\_\_\_ minutes**)
    - The counter can be set for a minimum of 15 minutes and a maximum of 4 hours.
  - Adjust the number of backups to save per case.
    - The minimum number of backups per case is 1 and the maximum is 100.
5. To ensure the file backed up for the time set, go to **File** and then **Manage Backups**. Click the carrot at the top of the dialog box to see the backups. The Quick Save in the example below was set for every 15 minutes (shown below). Click **OK** to close the dialog

box.



#### To recover full backups

1. Click **File** and then click **Options** to open the **Sanction Options** dialog box.
1. Click **Backup** to review the **Set Backup Options**.
2. In **Default Backup Location**, click the file path to set the path for the folder where you want to store the backup cases. Browse to the location to save the cases and then click **Select Folder** to save the changes.
3. In **Automatic Backup Settings** do the following:
  - Check the box to set the timing for automatic back up. (**Quick save every \_\_\_\_\_ minutes**)
    - The counter can be set for a minimum of 15 minutes and a maximum of 4 hours.
  - Check the **Full backup on close** box to activate the settings upon closing.
  - Adjust the number of backups to save per case.
    - The minimum number of backups per case is 1 and the maximum is 100.



5. Click **OK** to close the dialog box.

#### Related Topics

- [About backups](#)
- [Backing up a case file](#)
- [Restoring case data](#)

## ***Managing issues with media playback***

This article provides support notes that pertain to any media playback issues in Sanction 5.

If you need more information, you can email the Sanction Support team at: [casemap.support@lexisnexis.com](mailto:casemap.support@lexisnexis.com), or call 800.833.3346 (option 3). The Sanction Support team is available between the hours of 9:00 a.m. to 7:00.

### **Media playback errors due to inaccessible media**

A media playback error will result if the file associated with a media item is inaccessible by the player. Media playback errors occur with any the following item types:

- Video or audio
- Media clips
- Playlists
- Video in synchronized transcripts

### **Symptoms**

The problem presents differently in the main program window versus in the presentation window.

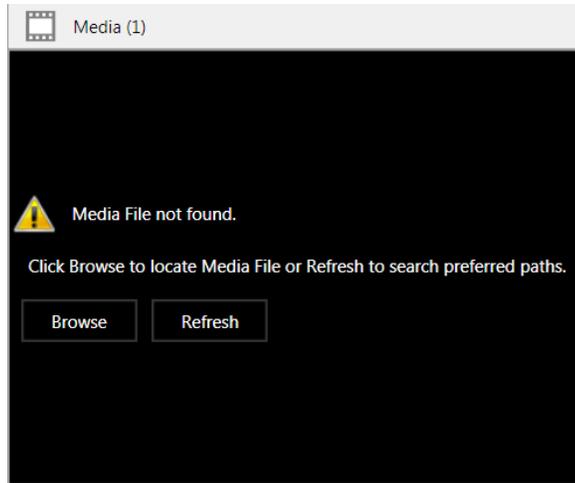
#### Main program window

In the media player, you see the following error message: "Media File not found. Browse of media, a media clip, or a playlist stops.

#### Presentation window

In the presentation window, the playback error message: "Media File not found. Browse of media, a media clip, or a playlist stops.

to locate Media File or Refresh to search preferred media paths."

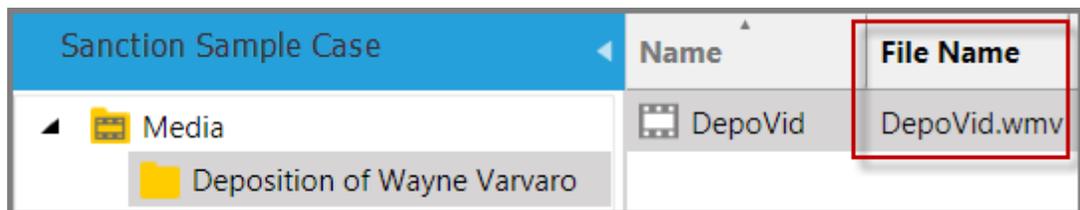


There is no other indication of an issue, except you can see an error icon  in the presentation toolbar. The tool tip for the warning reads, "Unable to load file for selected item."

**Cause**

Playback problems may result when any of the following conditions are true:

- The file was renamed since it was imported into the case. If the file was renamed, you can try changing it back to the name it had when it was imported. If you do not know the original name, you can find this out by opening the Media task area. Select the media item. The file name registered for the media item when it was first imported can be found in the second column of the media item list.



- Your computer is no longer connected to the network or device that holds the media file. If this is the case, try to re-establish a connection to the network or device.
- The path to the media file is not listed as a preferred media path for the case. The steps to resolve this condition are described in the table below. For more information on how to prevent this issue, see: Preferred Media Paths.
- The file was moved since the time it was imported. If the file was moved, you can add a preferred media path to the new folder location for the media file, or, move the file back to its original folder.
- If the media playback issue is with a synchronized transcript, it can be that the media for the transcript was never imported. In this case, try to import the transcript media. For more information, see: Importing Media. Or add the path to the media file as a preferred media path for the case. This method is described the following table.

The following table provides the steps for establishing a preferred media path to a missing media item. This can be done whether a presentation is running or not.

From the main program window	From the presentation window while
------------------------------	------------------------------------

## a presentation is running

**Resolution**

1. In the media player window, click **Browse**.
2. Browse to the folder that contains the media file.
3. Select the media file and then click **Open**.
4. In the media player window, click **Refresh**.

**Resolution**

You can resolve media path issues while a presentation is running without closing the presentation.

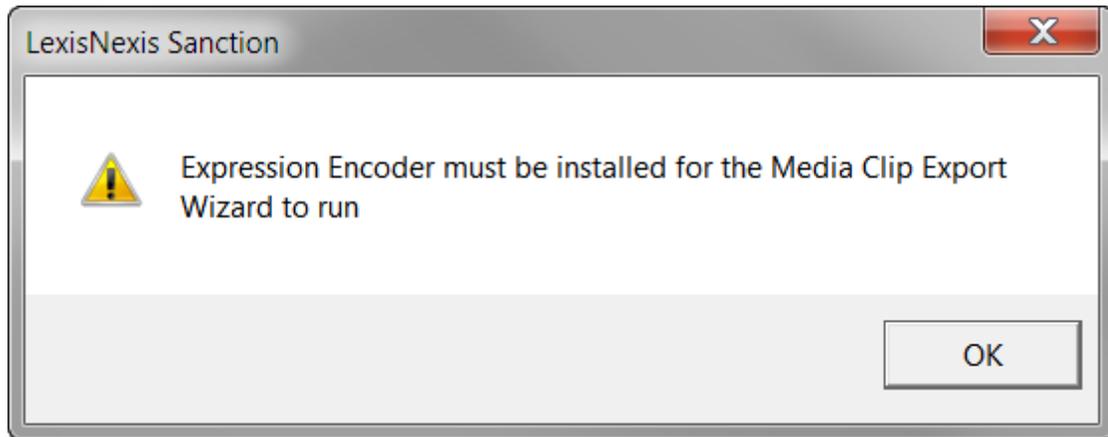
1. With the presentation still running, return to the main program area.
2. On the FILE tab click **Info**.
3. Select **Media Paths**.

**FILE > Info > Media Paths**

4. In the Case Media Paths dialog box, click **Add**.
5. Select **Browse** and then browse to the folder that contains the media file.
6. Click **Select Folder**.
7. Click **OK** and then click **OK** again.
8. Switch back to the presentation.
9. Reload the media item.

☐ **Export of media-related items stops if Expression Encoder is not installed**

Microsoft Expression Encoder 4, Service Pack 2 must be installed for the export of media, media clips, or playlists. If you do not have Expression Encode installed and attempt to export media an error message will open and the export process will stop.



### Resolution

There are two possible resolutions:

- Download and install the [Microsoft Expression Encoder 4 with Service Pack 2 \(SP2\)](http://www.microsoft.com/en-us/download/details.aspx?id=27870) from Microsoft.com. (<http://www.microsoft.com/en-us/download/details.aspx?id=27870>).
- Uninstall Sanction. Then install Sanction again, this time selecting the option to also install Expression Encoder. Reinstalling Sanction removes any prior activation so it may need to be reactivated. For more information on activating Sanction, see: [Installing Sanction](#).

### Media playback fails when codecs are missing

#### Symptom

After importing a media file, when you try to open it in the media player, an error message box opens saying it cannot play the file.

#### Cause

A codec may be missing that allows your computer to play the media file.

#### Background

A codec is a small program that allows your computer to play a specific type of media file. Your computer needs a different codec for each type of media file you want to play. When you attempt to open a media item in Sanction, playback will fail if the codec required to play that type of file is not installed.

#### More Information

Codec support for the media player in Sanction is provided by the Microsoft Windows Media Player 12. The range of codecs installed with Windows Media Player 12 is extensive and allows playback of the most commonly used media file types and subtypes. For more information on working with codecs with Windows Media Player 12, especially with determining which codecs are installed on your computer and how to add new ones, see the Microsoft Knowledge Base article, [Basics about videos and video codecs in Windows Media Player](#) on the Microsoft support website.

### Sanction log files

Sanction writes log files that store usage data for the 10 most recent sessions. If you need to contact support, you can provide them with log files, which might help to troubleshoot Sanction. Sanction saves the log here:

`C:\Users\UserName\AppData\Local\LexisNexis\Sanction\3.6`

Where *UserName* represents the user name you use when you log on to Windows to run Sanction.

Related Topics

System Requirements

Installing Sanction

[Moving Cases and Media Files](#)

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