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About CaseMap Server

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What's New in Version 2.0

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Managing the CaseMap Admin Console

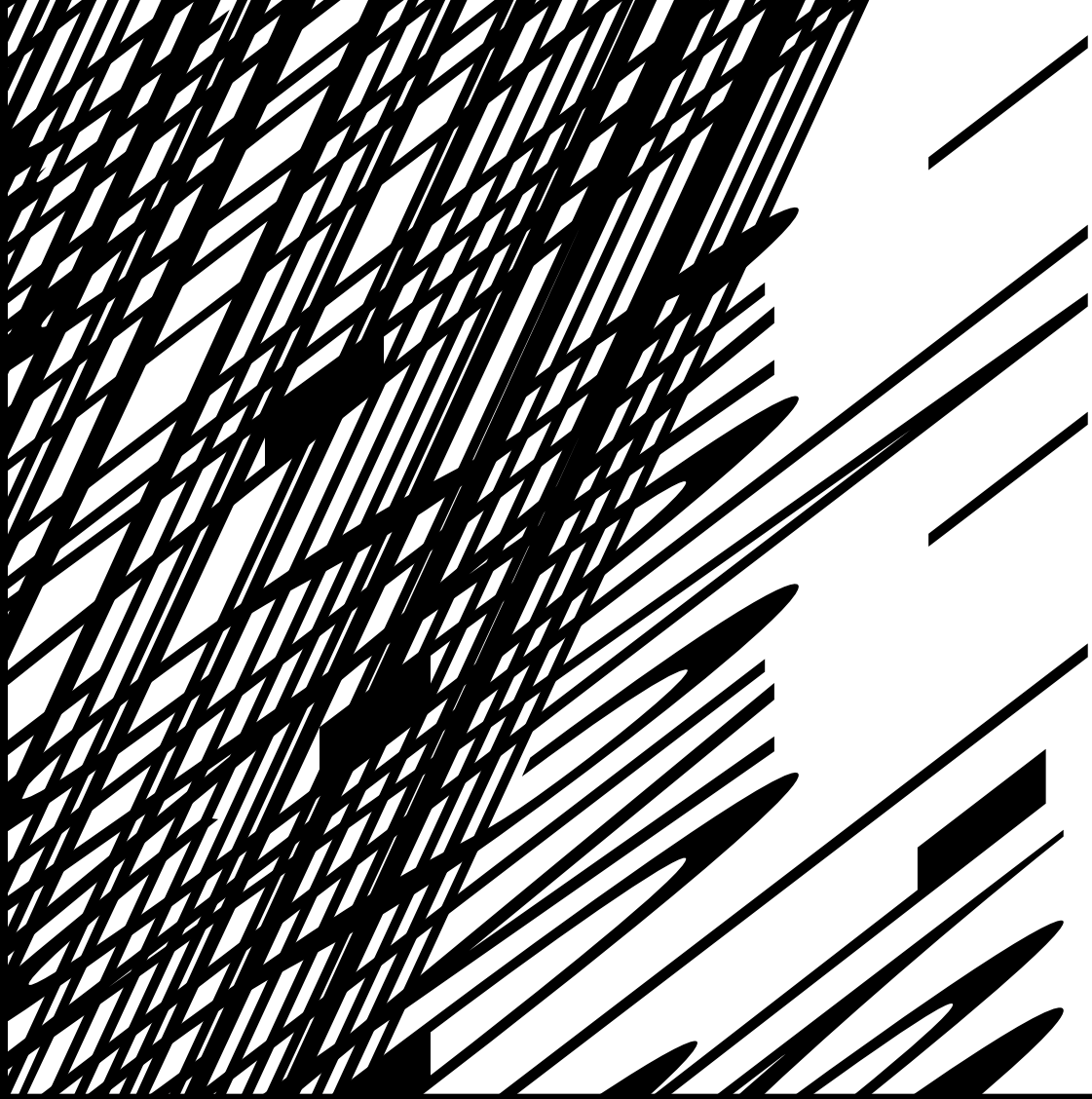
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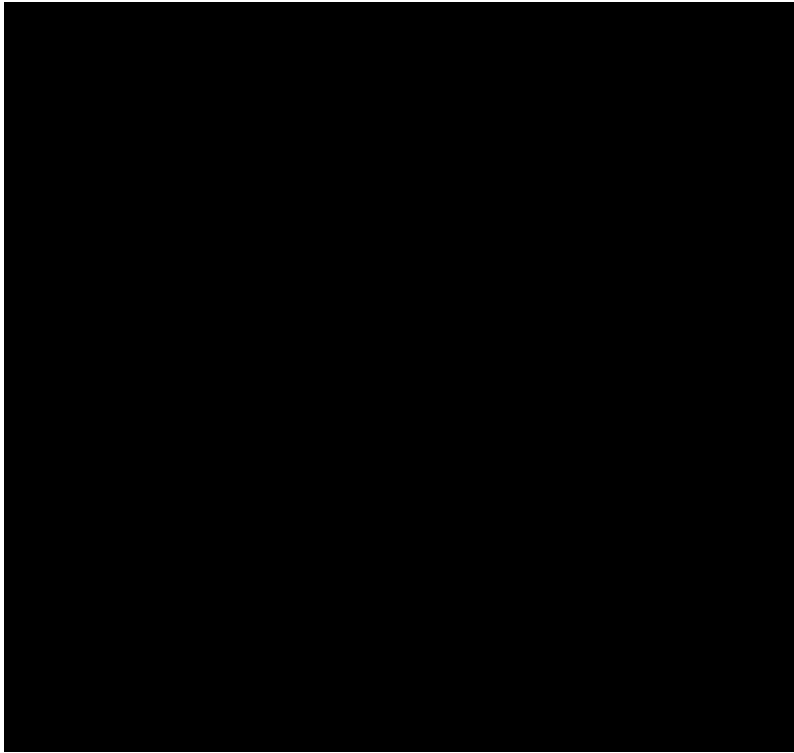
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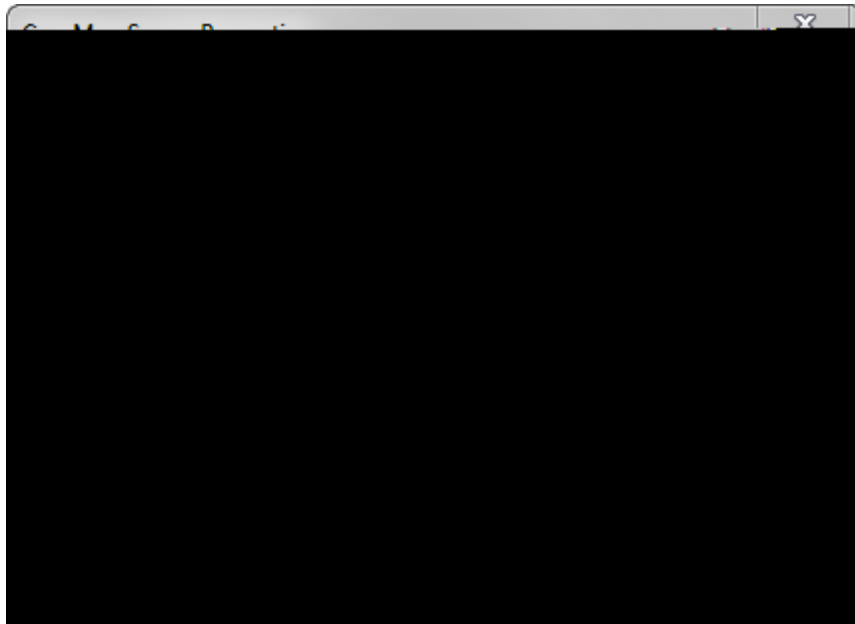
Registering CaseMap Servers

Registering CaseMap Servers

The Tools > Options tab allows you to register CaseMap Servers in the CaseMap Admin Console so that you can connect to it. The CaseMap Servers tab lists all servers registered in the







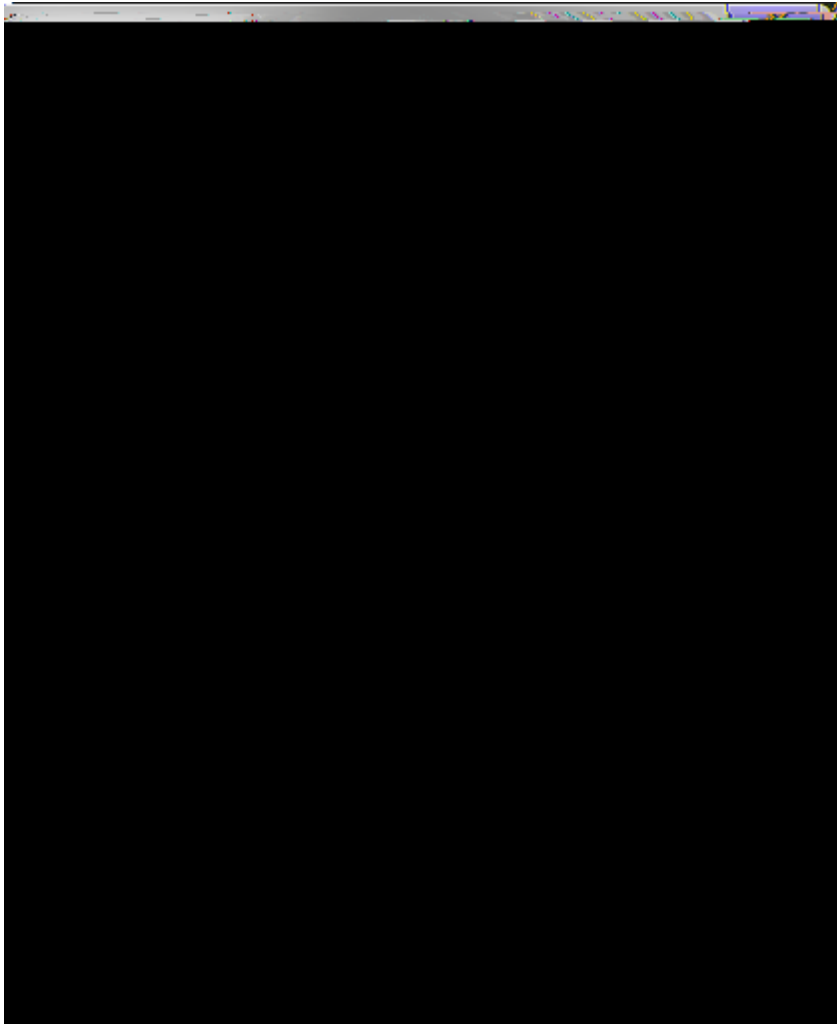
3. In the **Cf[Ub]nUh]cb'cf Z]fa 'bUa Y** field, type in the name of your organization.
The maximum character limit for an organization or firm name is 255 characters.
4. In the **DUggk cfX Dc`]WVg** area, type in the minimum number of characters for the password length.
5. Select the **DUggk cfXg'a i ghia YYhVta d`YI]hmifYei]fYa Ybhtg** check box to enforce this policy.

The password requirements enforced by selecting this option include:

- Passwords must be six characters or longer
- Passwords cannot contain three or more characters of the UserName or FullName
- Passwords need to have at least three of the four following classes of characters:
Numeric, UpperCase, Special Characters (e.g. @, #, \$, etc)

Click **C?** to save your settings.

[Related Topics](#)



A red dot now displays on the server icon

Renaming SQL Servers

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

 [_Hc`fYbUa Y`U`GE @`GYfj Yf](#)

4. In the **GE @GYfj Yf 'DfcdYfhYg** dialo

tloTd [(e)162(i)24(av)9he'D%Â2JFN

 [How to Use CaseMap](#)


Related Topics

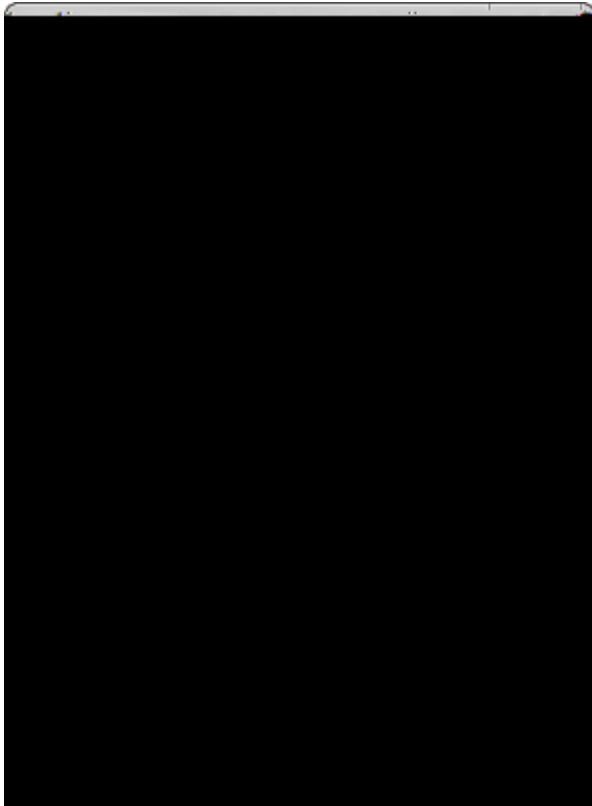
- [Creating roles](#)
- [Renaming roles](#)
- [Deleting roles](#)

Exporting a list of roles

You can export a list of roles to reference later using Microsoft® Excel.

Exporting a list of roles

1. In the **Roles** pane, right-click on **Roles**.
2. Click the **Export to Excel** button .
3. In the



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

14. In the **FYUXmic** ~~=a~~ **dcfhp**(t)-23 12 Tf 107 0 Td J /C2_,l(t)-v tehe im(t)-23(c)21((o)-6b0 Td .

Disconnecting case users

You can disconnect all case users from a case if you need to perform administrative tasks that require exclusive access to the case, such as deleting or upgrading a case. When you



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

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

[Creating users](#)

Managing SQL Cases

About SQL cases

The SQL Cases pane allows you to set up CaseMap or TextMap cases on an SQL Server. Here you see a complete listing of all SQL cases which includes the name, case type, client matter number, the server where the case resides, the danameer, , t9(t)-23(h)-34(e)-71()19(d)-44(a)-66()19(n)-34



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



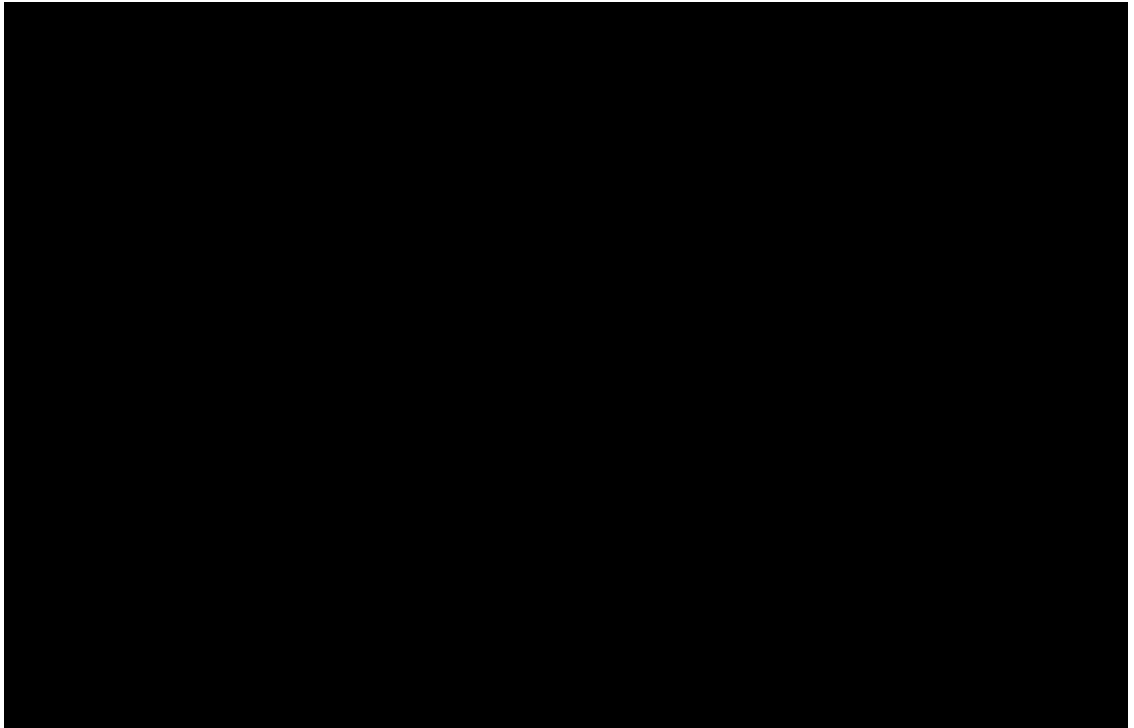
5. In the **BYk '7UgYA Ud'GE @7UgY** dialog box, click the TextMap version you want to use in the **J Yfgjcb** list.

If the Version list is disabled, you can still create SQL cases for the version for which you have permissions granted.

6. In the **7UgY'BUa Y** field, type in a name for the new SQL case.

The maximum case name is 100 characters.

7. In the **7'JYbhA UHYf' Bc"** field, type in the client matter number .3<0052>20<00T116 -28



To remove a case from the TextMap Access Cases to Import box, select the case you want to delete and click Remove.

11. In the **File Path** field, type in the file path (m-34()-71()19(i)24(e)4()-u19((19(t)-23(

18. In the **GUJ Y** dialog box, navigate to the folder where you want to save the log file, then click **GUJ Y**.
19. Click the **L** to close the dialog box when you are finished.

Related Topics

[Creating SQL cases](#)



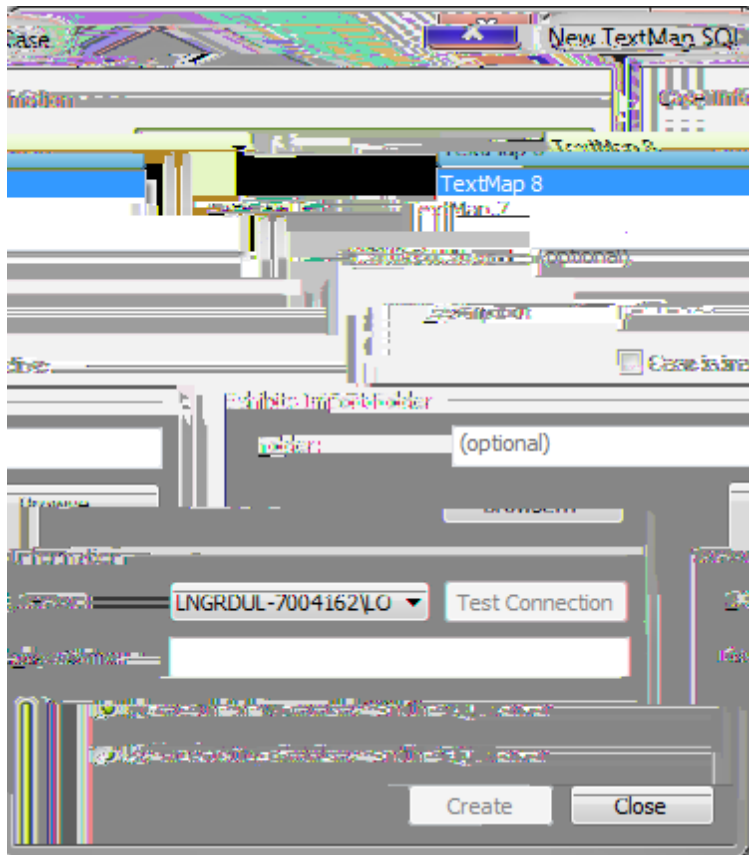
This dialog box is named Register CaseMap SQL Case Database, if you selected CaseMap SQL.

6. In the **7UgY'BUa Y** field, type in the case name.
The maximum case name is 100 characters.
7. In the **7jZ** field, type in the client matter number (optional).
The maximum client matter number is 100 characters.
8. In the **8Z W** field, type in a case description (optional).
The maximum description is 200 characters.
9. In the **GE @GZ j Z** drop-down list, select the SQL Server you want to connect with this case.
10. In the **8UHVUgY'BUa Y** field, type in the exi23(h)-34(e)- /C2_0 129T19(S)17(e)-71(r)10(v)

Mapping users

Mapping users is the process of matching up the users stored in a CaseMap or TextMap case that you are importing or manually registering with the users that are already registered with

6. Continue mapping case users until you are finished.
7. Click



Changing the case server

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



1. In the **Case List** pane, click on **Case Name**.
2. Right-click on the case you for which you want to change the server and click **Case Properties**.

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

3. In the **Case Properties** dialog box, click the **SQL Server** button.
4. In the message box, click **OK**.
5. In the **SQL Server** dialog box, select a new SQL Server in the **SQL Server** listing.
6. Click the **Test** button to ensure a connection to the new SQL Server.
7. In the message box to confirm the connection, click **OK**.
8. Click **OK** when you are finished.

Related Topics

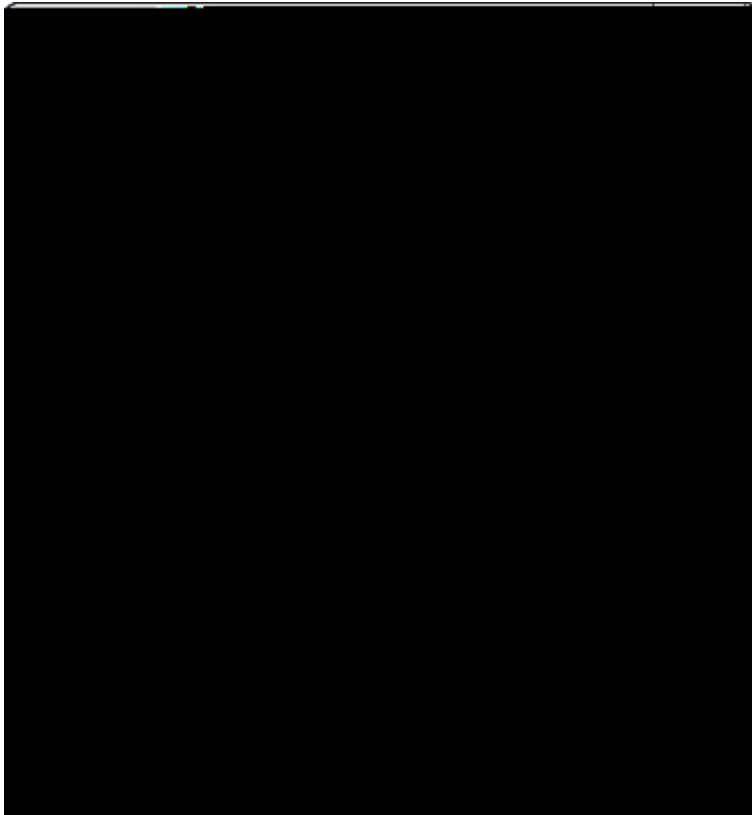
[Editing case properties](#)

Renaming cases

Each case name must be unique. The maximum case name is 100 characters.

 [Hc`XYUMj UHY`U`WgY](#)

Snapshots cannot be used to edit data in a CaseMap case. Snapshots cannot be synchronized



4. Click the **7\Ub[Y** button.
5. In the **GY`VM-bXYI `@cWljcb** dialog box, click on the index location you want or click the **BYk `@cWljcb** button.

In the New Index Location dialog box, type in the new index location name and path, then click OK.

7. Click **C?**.
8. In the **GE @7UgY`DfcdYfhYg** dialog box, click **C?**.

The new index location now displays in the Index Location column in the SQL Cases list.

Index locations are sorted by the index location name.



Exporting the index locations list

An exported index location list is saved in a directory folder where you can reference it later using Microsoft® Excel. The index location name and path display in the list.

 [_Hc`YI dcfh\h.Y`\]bXYI ``cVW\]cbg``\]gh](#)



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