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## About CaseMap Server

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## Managing the CaseMap Admin Console

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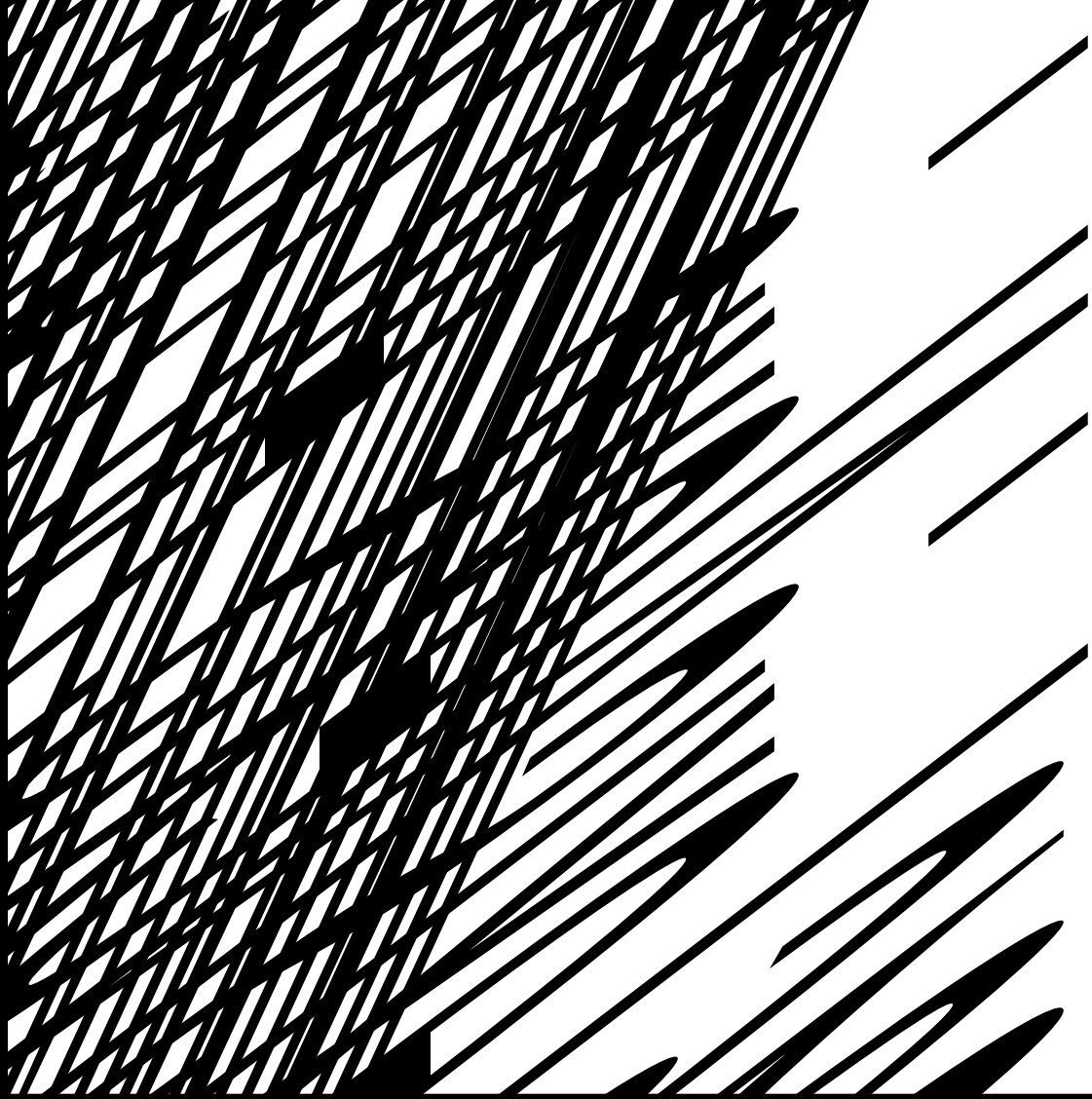
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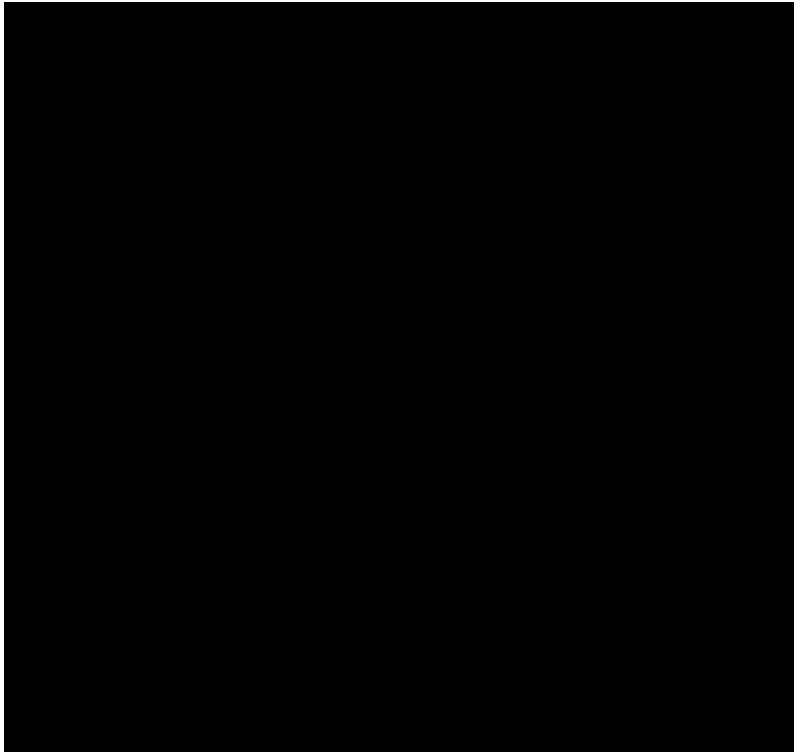


## ***Registering CaseMap Servers***

### **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











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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





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 [Hc`WYUH`U'fc`Y](#)






















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

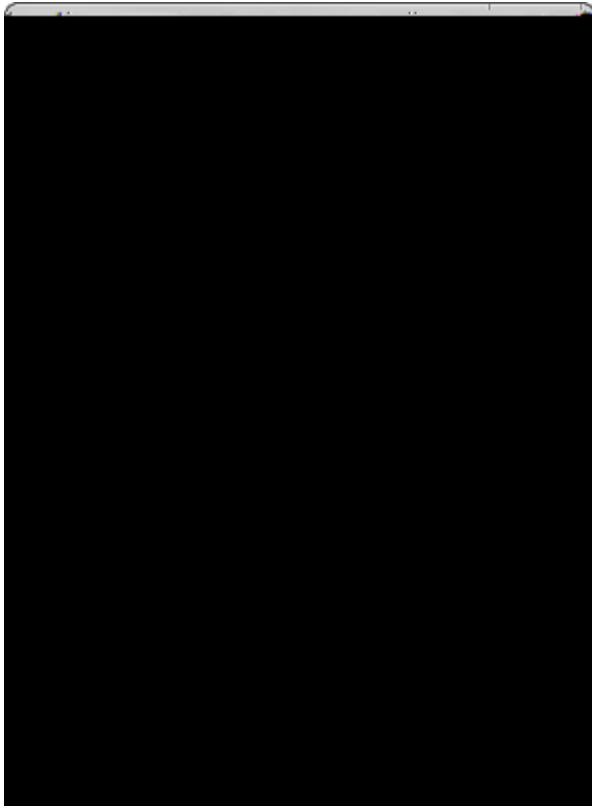
### ***Exporting a list of roles***

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

#### ***Exporting a list of roles***

1. In the **7UgYA Ud'GYfj Yf** pane, right-click on **F c`Yg**.
2. Click the **9l dcfh`]gh** button .
3. In the

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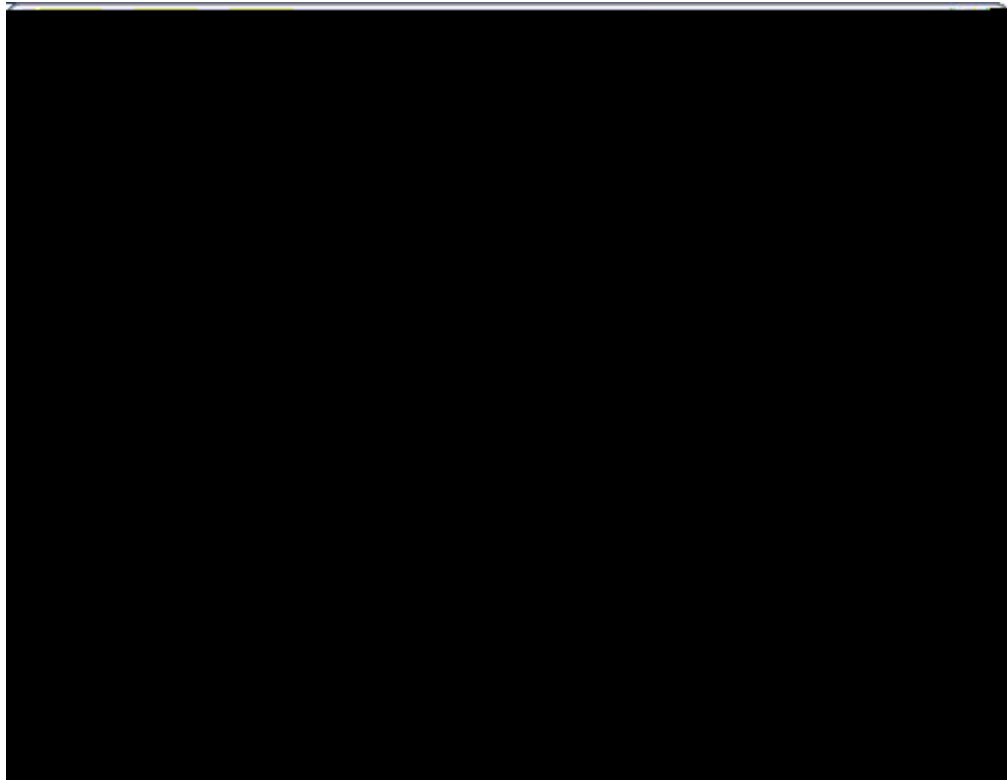












You can also wait to assign roles in the CaseMap Admin Console after the import.

14. In the **F YUXmic** ~~=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 updating the case.







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

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

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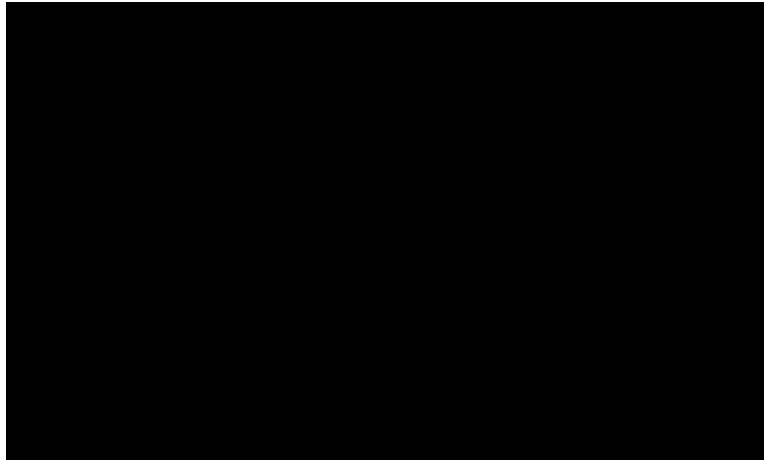
[Creating users](#)







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

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Upgrading cases



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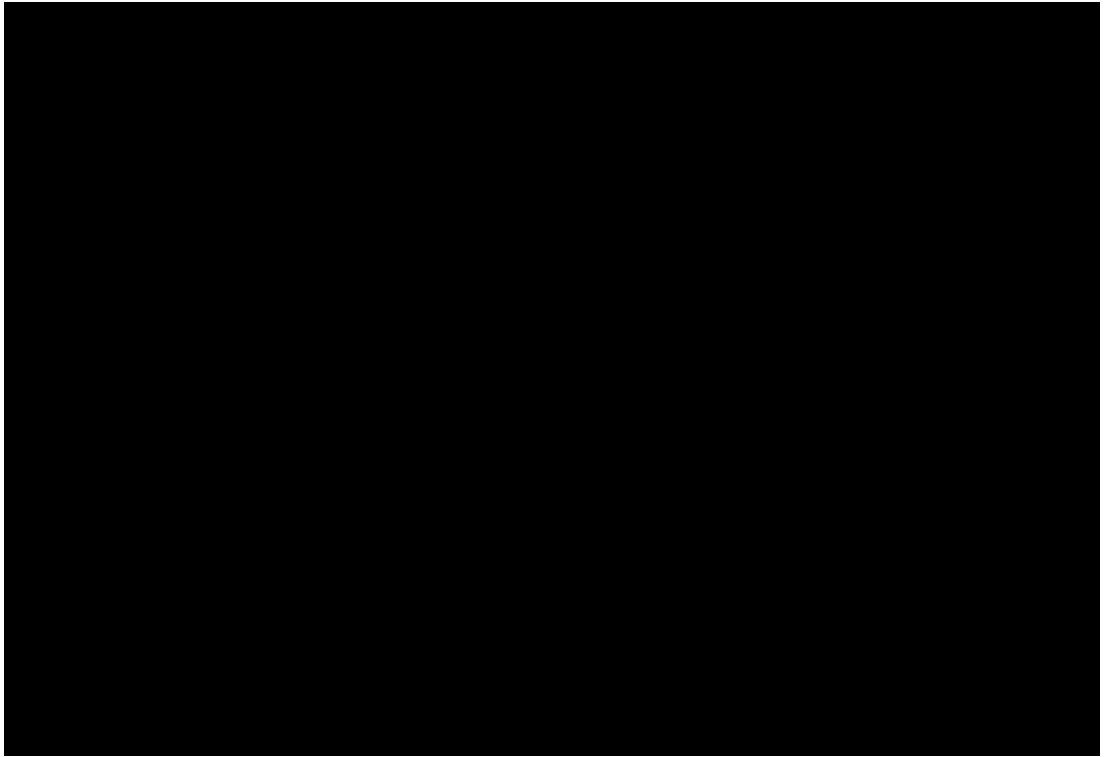
18. In the **GUj Y`a dcfh@c[** dialog box, navigate to the folder where you want to save the log file, then click **GUj Y**.
19. Click the **L** to close the dialog box when you are finished.



[Creating SQL cases](#)

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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



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6. Continue mapping case users until you are finished.
7. Click **C?** to save the users.

The mapped users can now access the SQL case version of this case.

Remember to assign users to roles. See [Creating roles](#)

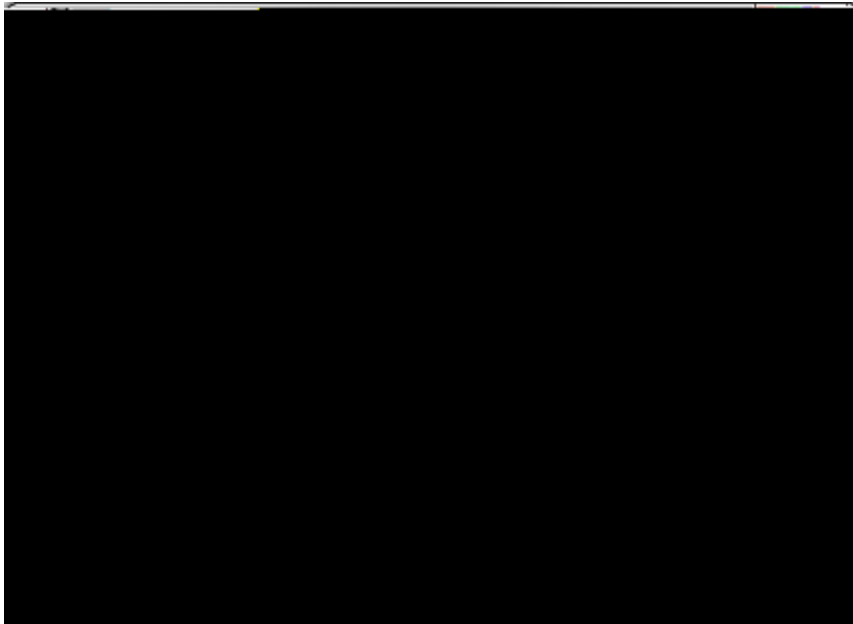












4. Choose whether to add or delete a word from the list.





## 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 ID**.
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 **Server** button.
4. In the message box, click **OK**.
5. In the **Server Selection** dialog box, select a new SQL Server in the **Server List** 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.

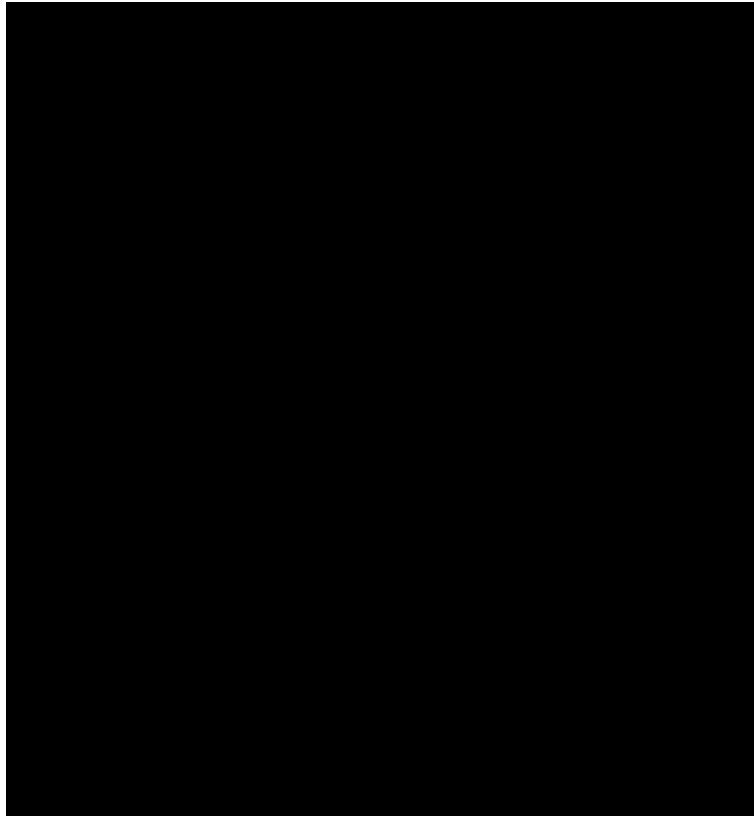


[Editing case properties](#)

## Renaming cases

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

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If you are viewing a case properties for a TextMap case, the Indexing tab does not display.

4. Click **C?** to save your changes.



[Renaming cases](#)





















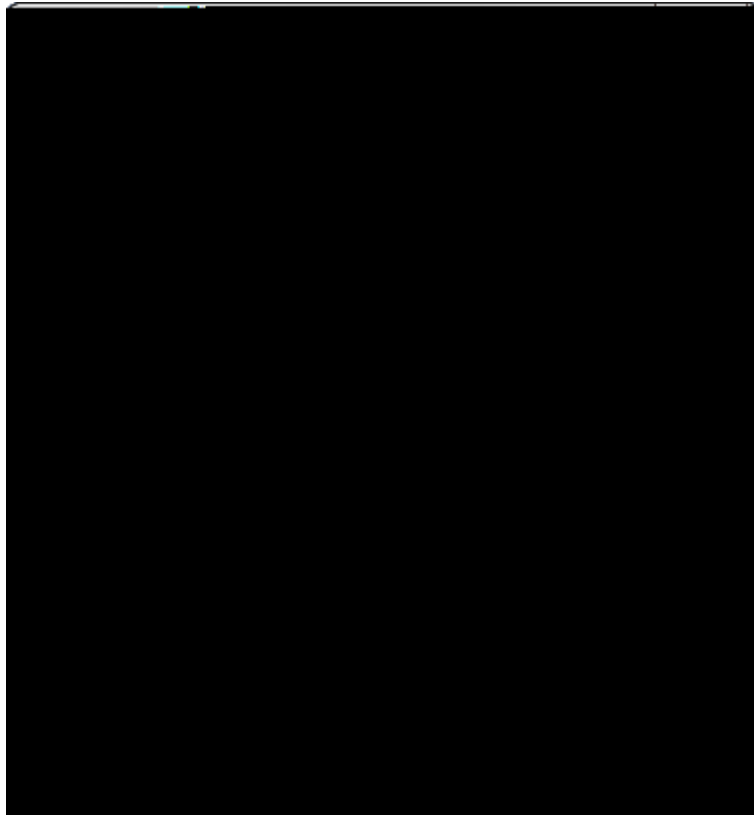
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4. Click the **7\Ub[Y** button.

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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